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**Religion and Religiosity— the Balkans
and the Black Sea Region**

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**Religion and Religiosity—
the Balkans and the Black Sea Region**

Editors

Iliya Nedin, Snezhana Dimitrova, Pavlina Solachka

On the cover: April 1916. Girls from the Greco-French school in Thessaloniki, *École des Filles de la Charité—Calamaria*, founded in 1894 by the Sisters of Charity of Saint Vincent de Paul—a Catholic female religious community established in Paris in the 17th century by Vincent de Paul and Louise de Marillac. Thessaloniki History Centre—“From the visit of foreign journalists to the School of the Sisters in April 1916 | School life | Rog. Viollet Collection”

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INTRODUCTION

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Religion and Religiosity—Historical and Contemporary Balkan and Black Sea Area Realities

Few phenomena have survived in human history with such breadth and depth as religion and religiosity. They permeate the private and public spheres, political discourse and cultural expression, artistic practices and everyday crafts. For centuries, religious beliefs and emotions have shaped people’s lives—creating collective and individual identities, motivating conflict but also limiting aggression, inspiring ethical frameworks and influencing personal development. Belief in a higher power and belonging to a religious community have long been central to how individuals and societies understand themselves—both in the past and today.

Religiosity—marked by personal devotion to the divine, or what Grace Davy calls “faith without belonging” —is a defining characteristic of modern secular societies. Changing perceptions and attitudes toward religion—among individuals, communities, and institutions, especially in times of crisis and social or environmental upheaval—continue to spark scholarly interest and spur new interdisciplinary approaches. These efforts aim to bridge knowledge gaps and explore new perspectives on familiar topics.

The study of religion in the humanities, social sciences, natural sciences, and applied sciences has a rich and long-standing tradition. In today’s rapidly changing political, economic, and cultural landscape—shaped in part by war and instability—scholars are once again turning to the paradigms of the 1990s, revisiting the hidden dimensions of human experience: dreams, emotions, and feelings, what Ludwig Binswanger calls “the most subjective of subjectivities.”

Historically and geographically located at the intersection of political formations, religious communities, and cultural and linguistic diversity, the Balkans and the Black Sea region are often defined as a crossroads, and a more accurate definition is contact zones of encounters over time between Orthodox Christianity, Orthodox and Heterodox Islam, Catholicism, Protestantism, the Armenian Apostolic Christian tradition, and more recently, various popular

and, rather, alternative practices of spirituality such as Dunovism, Neopaganism, etc. The study of religion and religiosity therefore requires an interdisciplinary approach that unites history, archaeology, philology, literary and cultural studies, anthropology, gender The Balkans and the Black Sea Region,” is the result of such an approach. The guiding idea is that religion cannot be viewed as an independent sphere of human existence. Rather, it is embedded in social relations and has its uses in political power, cultural memory, linguistic expression, education, literature, public space, and everyday life, both historically and in our time. Contributions range from ancient religious practices and medieval textual traditions to 19th-century missionary activity, historical and contemporary literary uses of religion, public visual manifestations of faith, hidden and overt religious emotions, diaspora, and post-socialist religious transformations.

The articles are arranged chronologically, but do not build a single narrative about religion, but rather show its dynamic nature and its various manifestations and dimensions. In this way, religion appears not only as a system of beliefs, but also as a means of responding to social problems and establishing moral and symbolic boundaries. Curse formulas, for example, as a sacred language from the most ancient times, are not only a hyper communicative religious expression of reverence for supernatural power, but also regulate human relations, establish an understanding of justice and thus have a connection with the social order. Curse formulas are also a subject of research interest in another historical context, in the manuscript medieval literary heritage. Their dissemination and preservation reveal their vitality of inherited religious traditions, but transmitted and interpreted in a different cultural and social context. Medieval hagiographic literature as an established spiritual and literary model shows another dimension of religion, political and military events through it are transformed into narratives through which communities interpreted catastrophes, survival and collective identities.

The questions of the encounter and representation between Orthodox Christians and Muslims and of mobility and transregional religious networks are topics in the presented issue. The Ottoman period created a long-lasting framework for interaction between different confessional communities, and textual sources provide important insights into the ways in which religious differences were perceived and represented. The approach taken goes beyond simplistic models of constant confrontation or harmonious coexistence and instead, it draws attention to the complexity of historical encounters. The example of the two holy men travelling between the Balkan and Ukrainian lands in the mid-eighteenth century illuminates the movements of religious figures and the networks of communication and exchange that extend beyond later national and regional frameworks. Such perspectives are particularly relevant to the present volume, as they highlight the importance of viewing the Balkans and the Black Sea region as interconnected cultural spaces.

Several contributions examine the nineteenth century, when religious life became increasingly intertwined with education, cultural transfer, literary

production, and the emergence of new public spheres. An examination of the circulation and representations of the Inquisition within Bulgarian Renaissance culture shows how translated literature and the periodical press contributed to the formation of attitudes toward religious authority, intolerance, and the European historical experience. The study of Sophrony of Vratsa's "Book of the Three Religions" raises broader questions about the representation of different religious traditions and the intellectual possibilities of tolerance. In the Balkan context, where religious pluralism has long been a defining feature of social and cultural life, such perspectives are particularly important for understanding the literary and historical dimensions of coexistence.

The intersection of religion, education, and transnational influence is further developed through research on missionary education and the connections between missionary initiatives, education, philanthropy, and cultural influence. These research show that religious actors can function simultaneously as agents of spiritual mission, education, social intervention, and cultural mediation.

Religion also appears in this issue as a linguistic, symbolic, and aesthetic resource. Thomas S. Eliot and Naim Frasheri's comparative study of the poetic languages reveals the functions of religious and metaphysical language in two different literary traditions. Their comparative perspective illustrates how religious vocabulary and symbolic structures can transcend particular linguistic and cultural contexts, acquiring new poetic and philosophical meanings.

The relationship between inherited symbolic systems and contemporary cultural issues is further explored in three contemporary Greek novels, where interest is directed at the rethinking of mythological and religious structures in relation to issues of gender and emancipation. Gender and religion are also central through the complex intersections of religious norms, gender roles, identity and feminist thought explored. Together, these contributions challenge rigid oppositions between tradition and modernity and draw attention to the multiple ways in which religious and cultural frameworks are negotiated in contemporary societies.

Issues of identity and public representation are focused on minority education and ethnic media, and this illuminates the thematic perspective on the mechanisms through which communities articulate belonging and difference. Religious, ethnic, linguistic and cultural identities often intersect, and the study of discourse minorities provides an important context for understanding changing forms of collective self-representation.

The final group of texts turns to contemporary forms of religiosity and the changing presence of religion in social and public life. Forms of spiritual search that exist beyond or alongside established religious institutions are examined. Such analyses challenge conventional definitions of religion and draw attention to individualized, hybrid, and transnational forms of belief. The material and political dimensions of contemporary faith, the visibility of religious symbols in public space, raise questions about memory, identity, authority, and the boundaries between the sacred and the secular. Religious presence thus becomes part

of broader conversations about meaning and symbolic ownership of shared environments. The dynamic relationship between the universal frameworks of Orthodox Christianity and their specific local manifestations is of particular interest. Religious traditions acquire specific meanings through communities, sacred sites, images, narratives, and religious practices, reminding us that living religion cannot be reduced to institutional structures or doctrinal formulations.

Related to this is the research interest in the tension between institutional authority and local folkloric practices as invented traditions. The processes by which practices are recognized, contested, or rejected as legitimate traditions reveal the complex negotiation of authenticity, cultural authority, and religious legitimacy.

The volume's perspective is extended beyond the territorial boundaries of the region by ethnic and religious spaces in the context of the Armenian diaspora. Migration and diaspora provide an important context for studying the reconstruction of religious and ethnic belonging. Religious spaces can serve simultaneously as sites of continuity, adaptation, collective memory, and the production of new forms of identity.

The end of the volume places a strong emphasis on the problem of the transition from state-socialist atheism to Orthodox Christian nationalism. The transformation from state-socialist atheism to a renewed public presence of Orthodox Christianity illustrates one of the most significant developments in the recent history of religion in Southeast Europe. This process cannot be understood simply as a return of religion after a period of suppression. Rather, it is a matter of reconfiguring religious tradition within new political, legal, and ideological contexts in which Orthodoxy, national identity, historical continuity, and public authority are increasingly intertwined.

Finally, this volume offers a reading of how one historian—a Jew and pronounced atheist—transformed our understanding of the historian's craft, the Eurasian folklore continuum, and the cultural genealogy of mythology by bridging history, psychoanalysis, and anthropology. Each of these fields, albeit in different ways, is deeply engaged with the study of religion and religiosity. During the production of this volume, we learned of the sad passing of Carlo Ginzburg. By including a tribute to this pioneer of microhistory and the history of mentalities (*histoire des mentalités*)—who masterfully interrogated the archival silences surrounding early modern popular beliefs and witchcraft—this volume sharpens attention to research that questions standard historical archives, turning forgotten or hidden stories into crucial tools for understanding our past.

Taken together, the contributions to this thematic issue demonstrate the diversity of approaches to religion and religiosity in the Balkans and the Black Sea region. Their chronological range—from ancient curse formulas and medieval hagiography to contemporary alternative spirituality, public religious symbolism, diaspora, and religious nationalism—reveals both the resilience of religious forms and their dynamics.

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The World Bids Farewell to Carlo Ginzburg: A Historian as “Inquisitor”, Detective, and Voice of the “Slag of History”¹

Abstract: During the preparation of this issue, the news of Carlo Ginzburg’s passing deeply saddened the global scholarly community. This essay pays homage to the co-founder of microhistory, whose theoretical insights and empirical studies reshaped the very fabric of the historian’s craft. Drawing on Carlo Ginzburg’s seminal essays, books, and interviews, this essay examines his unique scholarly trajectory within the collective movement of Italian analytical history, highlighting how he challenged traditional synthesis and redefined the interplay between micro and macro scales by introducing distance and intimacy as vital critical tool, while clarifying the distinctions between history and its rivals in representing reality: fiction and memory. The text emphasizes how the historian’s immersion in morphology expands the horizons of micro-textual analysis, transforming the traditional triad of testimony, document, and archive into a novel investigative category that bridges history, literature, anthropology, and phenomenology. Furthermore, the essay focuses on his journey as a scholar of Jewish ancestry who, coming of age within a Catholic milieu, navigated a deeply singular and profoundly felt claim of the past. Through a Freudian lens, this response was later seen as an unconscious strategy—a stimulus to address archival lacunae, silences, and fragmentation by effectively priming historical methodology for both self-reflexivity and the affective turn.

In conclusion, this essay demonstrates how Carlo Ginzburg consciously refrains from political activism. Instead, by uncovering the repressed historical lineage behind the persecution of heretics, Jews, lepers, and witches—while exposing the power dynamics of trials and relational asymmetries—the historian establishes a method that directly counters historical skepticism and safeguards empirical integrity. Carlo Ginzburg’s approach offers a powerful legacy, affirming the fundamental value of historical scholarship—archival research, theoretical reflections, rigorous analysis of evidence, and, above all, an enduring passion for truth.

Keywords: *Carlo Ginzburg, Adriano Sofri, peasant cosmogony, religious beliefs, benandanti, Wolf-Man, witches, Inquisition, close-up, indiciary paradigm, evidence and proof, morphology, archive, rhetoric, truth, distance and proximity, reflexivity, microhistory, affects, ethics*

¹ The title is based on Carlo Ginzburg’s metaphors for the historian’s craft—as articulated in the collection gathering his foundational works (Ginzburg 2013) and further developed in various interviews—reflecting the complex relationship and frustrating emotions he experienced while studying the trial records of heretics and witches, and facing the dialectics of distance and intimacy as a key epistemological challenge in historiography. This article is a result of the implementation of project BG16RFPR002-1.014-0011 Sustainable Development of the Center of Excellence “Heritage BG,” funded under the grant aid procedure BG16RFPR002-1.014 “Sustainable Development of Centers of Excellence and Centers of Competence, Including Specific Infrastructures or Their Associations from the National Roadmap for Scientific Infrastructure”.

A Jew, a Historian, an Atheist Who, in a Different Way, Gave the “Microphone to the Ants”²

“Carlo Ginzburg has left us; his passing leaves us poorer, yet it may also offer an opportunity to embrace his teachings in a different way,” Janja Jerkov wrote to me with deep sorrow on the day the sad news spread through the Italian academic milieu.³ Mourning for the renowned historian was not confined to the academic world. Tributes to the distinguished scholar were paid by *La Repubblica*,⁴ *Corriere della Sera*,⁵ *Le Monde*,⁶ *The Washington Post*,⁷ *The Guardian*,⁸

² I would like to thank Iannis Carras for his thorough native-speaker editing of this text. I thank the anonymous reviewers for encouraging the publication of this text. However, without the incisively critical comments of Janja Jerkov and Giovanni Levi, this article would not look the way it does. It began as an obituary for the In Memoriam section of *Balkanistic Forum Journal*; it is up to the readers to judge the final result.

³ Born in Turin on April 15, 1939, to the famous writer and intellectual Natalia Ginzburg and the anti-fascist scholar Leone Ginzburg, the influential and highly acclaimed Italian historian Carlo Ginzburg passed away at the age of 87 in Bologna on June 17, 2026.

⁴ De Santis, Raffaella. Carlo Ginzburg è morto, addio al grande storico italiano. – *La Repubblica*, 17 June 2026. Available at: https://www.repubblica.it/cultura/2026/06/17/news/carlo_ginzburg_morto_storico_libri-425415779/ [accessed 17 June 2026]; Belpoliti, Marco. Carlo Ginzburg, dal mondo dei vinti al dilemma dell'identità. – *La Repubblica*, 17 June 2026. Available at: https://www.repubblica.it/cultura/2026/06/17/news/carlo_ginzburg_le_opere-425416348/ [accessed 20 June 2026].

⁵ Carioti, Antonio. Morto Carlo Ginzburg, il grande storico italiano teorico della «microstoria». Aveva 87 anni. – *Corriere della Sera*, 17 June 2026. Available at: https://www.corriere.it/cultura/26_giugno_17/morto-carlo-ginzburg-storico-maestro-microstoria-ef1c5e43-f92f-499d-94fb-24ed29802xlk.shtml [accessed 20 June 2026]; Di Stefano, Paolo. Carlo Ginzburg: «Fa bene alla storia affidarsi al caso». – *Corriere della Sera*, 17 June, 2026. Available at: https://www.corriere.it/cultura/26_giugno_17/carlo-ginzburg-fa-bene-alla-storia-affidarsi-al-caso-b27448fb-f087-49a5-9418-6d519c393xlk.shtml [accessed 20 June 2026]; Stajano, Corrado. Ginzburg, I destini incrociati di Tolstoj. – *Corriere della Sera*, 17 June 2026. Available at: https://www.corriere.it/cultura/26_giugno_17/ginzburg-i-destini-incrociati-di-tolstoj-7d5b5215-ad79-4ee5-9e1f-cc1cd64e8xlk.shtml [accessed 30 June 2026].

⁶ Dujin, Anne. Italian historian Carlo Ginzburg, founding figure of microhistory, has died. – *Le Monde*, 17 June 2026. Available at: https://www.lemonde.fr/en/obituaries/article/2026/06/17/italian-historian-carlo-ginzburg-founding-figure-of-microhistory-has-died_6754597_15.html?srsltid=AfmBOooNoPfiVnEOZOuidaL9-KQ9USpa3ihbuZpIk1pbN2MTklMohy17 [accessed 17 June 2026].

⁷ Zampano, Giada. Microhistory pioneer Carlo Ginzburg, who gave voice to the marginalized, dies at 87. – *The Washington Post*, 17 June 2026. Available at: https://www.washingtonpost.com/world/2026/06/17/italy-carlo-ginzburg-dead-micro-history-pisa/d7ea2cea-6a50-11f1-830e-133d20cadd28_story.html [accessed 20 June 2026].

⁸ The Guardian view on the death of Carlo Ginzburg: a historian who taught us to think about outsiders. Editorial. *The Guardian*, 22 June 2026. Available at: <https://www.theguardian.com/commentisfree/2026/jun/22/the-guardian-view-on-the-death-of-carlo-ginzburg-a-historian-who-taught-us-to-think-about-outsiders> [accessed 30 June 2026]; Foot, John. Carlo Ginzburg obituary. – *The Guardian*, 1 July 2026. Available at: <https://www.theguardian.com/books/2026/jul/01/carlo-ginzburg-obituary> [accessed 3 July 2026].

New York Times,⁹ the newspaper that was always very sensitive to and closely monitoring Ginzburg's research and civic stance.

Tributes paid to the scholar who transformed the way we think about and understand the past formed a common thread running through the obituaries published. It was as if we were deeply reluctant to bid farewell to Carlo Ginzburg, a man whose moral and scholarly perspective reshaped our outlook by training our gaze to focus on ambiguity and marginality. We mourn both the historian and the citizen, one of the founding fathers of microhistory, who aspired to be an art historian, philologist, writer,¹⁰ and who once poignantly defined himself as a historian, a Jew, and an atheist."

"The person writing to you is a Jewish, atheist historian who has worked for many years on Inquisition documents." According to Carlo Ginzburg, these were the opening words of the letter he sent to Pope Karol Wojtyła in 1979, advocating the opening of the Holy See's archives (*Congregazione per la Dottrina della Fede*).¹¹ Although he had forgotten about the letter until he was reminded of it by a phone call from the Vatican (Murphy 2012: 15),¹² he did not fail to exploit the expression "elder brother," that Wojtyła used in 1986, when he addressed Jews during his historical visit to the Great Synagogue of Rome, turning it into an inspiring essay on the real power of supersessionist theology (Ginzburg 1998: 210–216). On the other hand—regardless of the analytical depth and evidence the historian used to highlight the dark, problematic aspects of the Church's attitude toward Jews and Judaism flickering behind this expression—what he viewed as a lapsus is not, after all, a Freudian slip. Although Pope John Paul II was the first to refer to the Jewish people as our "elder brother," the groundwork for this reference had already been laid in the Church doctrine emerging from the Second Vatican Council (1965). In this context, using the term *lapsus* in the strict Freudian sense might have caused Freudian psychoanalysts to raise their eyebrows; this phrasing was, rather, a deliberate, deeply theological statement. While this usage is clearly personal, it prompts the question of how deep and subtle his identification with Judaism runs¹³—though

⁹ Kandell, Jonathan. Carlo Ginzburg, Who Told the History of the Obscure, Dies at 87. – *The New York Times*, 17 June, 2026. Available at: https://www.nytimes.com/2026/06/17/books/carlo-ginzburg-dead.html?unlocked_article_code=1.-VA.156O.yGWpAuN_PLSH&smid=nytcore-android-share [accessed 17 June 2026]

¹⁰ See Mangeot 2007: 98; Dayeh 2022: 198.

¹¹ For the history of this letter—which, according to Carlo Ginzburg's own account, he lost but which is evidently preserved in the Vatican Archives—see Cullen Murphy's fascinating book on the history of the Inquisition (Murphy 2012: 14).

¹² See also Dayeh 2022: 203.

¹³ "I am a Jew who was born and who grew up in a Catholic country; I never had a religious education; my Jewish identity is in large measure the result of persecution," as the historian confessed in the introductions to two of his influential books, published on the eve of the 21st century (Ginzburg 1998: 12). These essays collection explore diverse topic, yet, they are united by his commitment to defending historical truth against purely rhetorical interpretations (Ginzburg 1998;

determining whether the “atheist Jew” is guiding the historian’s hand here is a research challenge far beyond the scope of this text.

We might simply note here that, judging by his deeply emotional and personal interviews, it is precisely the circumstances of being a Jew born and raised in Catholic Italy—and a historian—that make him the heir to a bloody past. Such a heavy heritage shaped the intellectual tools he uses to think and understand the past—tools that are inextricably linked to the relationship between Christianity and Judaism, a relationship marked by persecution and violence, where the “original sin” of their historical interaction lies in a specific Christian claim: “to be the true Israel,” as Ginzburg puts it. In this regard, a disquieting legacy—history—confronts them with the claim of the past: to preserve the truth of the fathers in order to affirm the truth of the sons,¹⁴ a claim that demands the contextualization of the idea of the true, the “encompassed and surmounted”—an idea of Christian origin, alien to the ancients, yet in itself a condition for the possibility of a history of thought, as Carlo Ginzburg argues (Mangeot 93–95).¹⁵

The new Pope, recently proclaimed as John Paul II, left the request of this Jewish atheist unanswered until papal authority passed into the hands of Joseph Ratzinger (Pope Benedict XVI).¹⁶ Carlo Ginzburg would nevertheless go on to

Ginzburg 1999), as well as his quest for the kind of distance that allows one to look reality in the eye without being destroyed by it. In both works—which contributed to methodological shifts in historiography—Ginzburg carefully examines the role of biographical elements in the approaches of thinkers such as Nietzsche and Paul de Man (Ginzburg 1999: 1–37). He points out that Nietzsche can hardly be understood without the history of the Third Reich, nor de Man’s methods without the antisemitic period of his life. Through his research, Ginzburg treats biography as both evidence and a problem, juxtaposing its objective chronological traces with interpretive gaps and archival fragments (Dimitrova 2010; Dimitrova 2019). At the same time, Ginzburg confesses that he is becoming increasingly conscious that his approach remains deeply linked to his experience as a persecuted Jew—a fact he himself revealed in a 2010 interview (Brayard 2010).

¹⁴ In this very emotional interview, to which we will refer often in this essay, C. Ginzburg stated that the Jewish conception of history is bloody at its origin and bases on the idea that something must be true in its context, but this truth is outdated and can be surpassed by a richer and deeper truth (Mangeot 2007: 94).

¹⁵ Later in life, Ginzburg claimed that being an atheist was of no consequence, whereas being Jewish profoundly mattered—a distinction that underscored the deep connection between his Jewish identity and his childhood persecution in Fascist Italy. We mention this here because the revelation recurs, but this time in response to an event that deeply affects him: during the official opening ceremony of the *Archivio*, Pope Benedict read the exact opening phrase of his letter to the late Pope John Paul II, just as Ginzburg had mentioned in one of his interviews (Dayeh 2022: 203).

¹⁶ Its story was recounted by C. Murphy in his book’s first chapter. “Cardinal Josef Ratzinger — noe Pope Benedict XVI — inviting him to the opening of the Archivio. Ah, bad luck: he had a conflict, Ginzburg wrote back. Then came a phone call from a monsignor at the Vatican. Ginzburg again demurred. “That’s a pity,” said the monsignor, “because your letter played a role in the opening of the Sant’Uffizio archive.” “Which letter?” was Ginzburg’s reaction. The monsignor said, “Your letter to the pope.” “What a memory!” Ginzburg replied. He found a way to change his plans” (Murphy 2012: 15). The last exclamation does not sound like a sophisticated sign of approval; rather, it is tinged with irony, behind which flickers the will for truth that fuels the historian’s stubborn audacity, a Jewish atheist who dared to challenge the authority of the Holy See;

achieve immense renown through three remarkable books on early modern popular culture, specifically on the beliefs of sixteenth-century peasants, and through his astonishing findings concerning what persecutors at the time mistook for witchcraft.

His pioneering books, *I benandanti* (Ginzburg 1966),¹⁷ *Il formaggio e i vermi* (Ginzburg 1976),¹⁸ and *Storia notturna* (Ginzburg 1989),¹⁹ uncovered anomalous cultural phenomena pursued by the Inquisition across early modern Northern Italy. For centuries, mainstream social sciences and the humanities had overlooked these trial records. Ginzburg, however, demonstrated that these documents offer unparalleled insight into the everyday social and cultural life of the period, illuminating the complex and ambiguous mentalities of both inquisitors and the accused. Each of these books explores acts regarded by inquisitors as aberrant and as a profanation of the Christian faith. In investigating these cases, the historian closely observes the attitudes, assertions, and behaviour of both judges and accused, individuals who were often categorised as possessed persons, witches, or shamans. Through this analysis, he shows how men and women from the lower social strata were assigned new identities through official rhetoric and inquisitorial accusations. Indeed, as the historian demonstrated, the methods and practices of the Inquisition caused these individuals to be viewed as the very embodiment of heresy, victims of demonic possession and carriers of subversive beliefs that threatened the foundations of the divine order.

By disclosing the complex, painful, and often messy encounter between inquisitors and the accused, Carlo Ginzburg's research reveals the frictions and clashes underlying the authorities' repression. At its core, this interaction was a struggle between established social norms and the unorthodox beliefs, ideas, and worldviews of the accused (Ginzburg 2013: 141–148). What strongly distinguishes Ginzburg's method, however, is the understanding of the anomaly as a space that reveals the hidden mechanism of the rules while simultaneously

thus, late in the 20th century, Carlo Ginzburg reminded the Vatican that its archives—effectively the Pope's private property—held the key to unlocking historical truths. By locking away these records of past lived experiences for so long, the Church fueled speculation; without critical analysis, the dark shadows of the past weigh heavily on the future, a belief Ginzburg, as both historian and citizen, maintained throughout his life. Since the letter appears to have played a pivotal role in the opening of the archive, it is important to note—as Cullen Murphy points out—that this represents yet another stage in a process that has turned the last few decades into a “golden age” for Inquisition studies. Although the archive is accessible to qualified researchers, and the history of the Inquisition remains far from “decolonized” (in Murphy's words), historians from Europe and the Americas have published hundreds of works that, taken together, subject certain traditional perceptions of the Inquisition to serious revision (Murphy 2012).

¹⁷ Ginzburg, Carlo. *The Night Battles: Witchcraft and Agrarian Cults in the Sixteenth and Seventeenth Centuries*. London: Routledge, 1984.

¹⁸ Ginzburg, Carlo. *The Cheese and the Worms: The Cosmos of a Sixteenth-Century Miller*. Baltimore: Johns Hopkins University Press, 1980.

¹⁹ Ginzburg, Carlo. *Ecstasies: Deciphering the Witches' Sabbath*. London: Penguin Books, 1992.

demonstrating that control is never all-encompassing—that there is always a “creak” in the system. The cases of the Friulian miller and the *benandanti* (*were-wolves*)—well documented within Inquisition archives—reveal an autonomous world of peasant culture that does not fit the inquisitors’ framework, while the accused themselves resists perceiving their actions as heresy according to the Church’s ideological constructs.²⁰ As Ginzburg maintains, these anomalies lay bare the system’s dysfunctions; they are the point where power stumbles, proving that reality is too soft, slippery, blurred, and characteristically elusive for the essentialist categories within which we attempt to frame it.²¹

In telling the story of Menocchio, a sixteenth-century miller from Friuli condemned by the Inquisition for the cosmogony in which he believed, Carlo Ginzburg showed how, despite his humble origins and low social status, this surprisingly literate and unorthodox-minded man could become the object of historical inquiry (Ginzburg 1976). As “the historian of the obscure” (*The New York Times* 2026), Ginzburg exposed the unknown world of popular culture in the sixteenth and seventeenth centuries while also creating opportunities to “understand the relationship between systems of beliefs, values, and representations, on the one hand, and social attachment, on the other hand,” as critics have emphasized.

Looking back critically at the twenty-five-year history of microhistory—“a scandalous manner” that originally courted controversy within the guild—Eduardo Grendi highlights the collective nature of this Italian research approach, which was born from a shared style: history as a practice grounded in a pressing need for theory and primarily concerned with analytical outcomes. Within this context, he emphasizes that even as early as his landmark study *The Cheese and the Worms*, Carlo Ginzburg was already forging his own unique

²⁰ See the sharp dispute between Carlo Ginzburg and Anthony Pagden in the pages of the *London Review of Books* (February–April 1984), which was provoked by Pagden’s review of Ginzburg’s *The Night Battles*. – Notes 56–58.

²¹ In the course of a project—“Crisis of National Identity: The Challenges of Microhistory as Research, Ethical, and Civic Paradigm (Case Studies),” 2009–2012—grounded in the premises of microhistory, we encountered instances where various Bulgarian consulates issued visas and passports to Jews during World War II in order to save them. These actions took place despite the restrictions imposed by the antisemitic Law for the Protection of the Nation. Within the iron grip of bureaucracy, “grains of sand” to use Ginzburg’s phrasing—driven by financial motives or sheer human empathy—disrupted the workings of the state machinery. The ultimate result, however, was human lives saved amidst an authoritarian regime with anti-Jewish legislation. It seemed like a clear paradox: the fissure within a patriarchal system of modernization—one striving to catch up with the West—confronted the methodological, systematic nature of the German spirit, yet ultimately worked toward a more just world; the world, however materially backward, possessed a clear sense, almost an intuitive grasp, of the boundaries between universal law and the private (of the state). Obviously, we were careful to strike a balance between proximity and distance, objectivity and intimacy: avoiding the idealization or over-generalization of individual acts, while ensuring they did not vanish into oblivion, overshadowed either by collective ecstasy (of hate, envy, disgust, and revulsion), or by the ideals of reason attributed to the elites. See Dimitrova and Nikolova 2013: 159–169; Dimitrova 2019: 150–197. The project was funded by Bulgarian Ministry of Education (Bulgarian National Science Fund).

path in the field.²² Given that microhistory was closely linked to (and, in a sense, derived from) social anthropology at the time, Grendi views Ginzburg's methodological breakthrough as unfolding in two areas. Through his microhistorical study, Ginzburg attacks the traditional historical synthesis and redefines culture not as an elite privilege, but as an epochal hallmark that encompasses the authentic experience of the lower social classes as an autonomous sphere, rather than as an imitation of high culture. On the other hand, the case of the Friulian miller reveals aspects of the distinctive social attitudes of the lower classes. Here, interrogation records highlight network relationships—including friendships and acquaintances—which, according to Grendi and adherents of social microanalysis, provide an excellent basis for examining the context in which the protagonist's personal choices could acquire significance.²³

Soon, however, Carlo Ginzburg became captivated by morphology, paving the way for cultural microhistory by expanding the scope of detailed textual analysis; he transformed the historian's sacred triad—testimony, document, and archive—into a new analytical category bridging the literary and historical fields (Ginzburg 1986; Ginzburg 2012)). This insightful approach continues to reveal the power of the microhistorical paradigm—one which, when combined with an innovative psychoanalytic approach, underscores the uniqueness of human experience and exposes the

²² Following the logic of his argument in his review of Carlo Ginzburg's *The Judge and the Historian*, journalist Alexander Stille emphasizes the groundbreaking study of the trial against the Friulian miller—"It is a classic work that, along with Natalie Zemon Davis's "Return of Martin Guerre," helped create the genre of "microhistory," an attempt to examine historical themes through seemingly small individual episodes, as he frames it. Because of its seminal importance, "The Cheese and the Worms" is the subject of a symposium that the American Historical Society is holding this year to celebrate the 25th anniversary of its original publication." His words validate Edoardo Grendi's analytical biography of microhistory revealing how the collective Italian invitation to approach history differently manifested at the individual levels, and why in USA the Italian microhistorical proposal is associated only with the name of Carlo Ginzburg. – Stille, Alexander. "When History Gets Personal; How an Italian Scholar Turned Advocate in a Terrorist Case". – *New York Times*, 11 march 2000. Available at; <https://www.nytimes.com/2000/03/11/books/when-history-gets-personal-italian-scholar-turned-advocate-terrorist-case.html> [accessed 9 August 2026].

²³ See Grendi 1994: 539–549. By emphasizing C. Ginzburg's rarely specific and very personal way of professing microanalytical research, E. Grendi argues that his work focuses strictly on the historiographical problem of cultural forms. Consequently, Grendi believes that Ginzburg avoids analytical approaches centered on social mediation or interpersonal relations, seeing him as uninterested in them. He argues that Ginzburg's discourse overlooks specific forms of expression, the complex dynamics between high and low culture, and the structural links between emerging cultural forms within a given social context (Grendi 1994: 548). Conversely, Ginzburg defends his research as an attempt to blur the red lines between the social and the cultural—two dimensions that shape the microhistorical analytical proposal to rethink history and strengthen its theoretical foundations. Over time, revisiting the case of the Friulian miller, Carlo Ginzburg repeatedly emphasizes that the network of social relations unraveling in the court records—as well as the sources that shaped Menocchio's worldview—lies at the heart of his microhistorical, case-based method, which requires the researcher to move from the specific to the general (Ginzburg 2007: 41–42).

hidden, *affective reality of the historical process by disclosing the fictionality of the archives* (Dimitrova and Nikolova 2013: 165); an argument we will come back to.

Whether analysing “popular cosmogony,” the beliefs, values, and worldview of an ordinary miller that underpinned his social allegiances (Ginzburg 1976), or the imaginary ritual battles for the protection of the harvest involving good and evil witches (Ginzburg 1966), or examining seasonal neo-pagan processions connected with historic farming cults over the centuries (Ginzburg 1989), as described in the testimony of the accused (including the priest’s sermon), the historian, a secular Jew, reinterpreted historical witchcraft prosecutions from a very different perspective. Ginzburg argued that trials against perceived anomalies function as mirrors of the hidden conflicts, fears, obsessions, and suppressed desires of the judges, thus revealing institutional anxieties. Prosecutions of perceived evil do not merely express what ordinary people believed; they also offer a window onto the psychological state of the prosecutors and its broader social implications for the clash between high (elite) and low (popular) culture. However, the fears and phobias of those in power can permeate the fabric of everyday life, intensifying collective nightmares. These anxieties evolve into myths, assume enduring cultural forms, and become lasting attitudes held by collectives, communities, and individuals toward the world.²⁴ At last, the persecution of heretics, witches, lepers, Jews... belongs to the same symbolic order through which power legitimizes the extermination of human beings.

Ultimately, the historian sheds light on the invisible tensions embedded in everyday actions. By highlighting their dynamics, he not only sharpens our focus on an opaque historical reality but also urges us to look closely at the traces left by those who seem never to have lived: what, in fact, do these traces reveal?

Carlo Ginzburg’s *indiciary paradigm* (Ginzburg 2013: 87–113)—which focuses on the marginal, the particular, the abnormal, and the accidental rather than the obvious, the general, the repetitive, and the successive (such as data on births, deaths, diseases, epidemics, and crimes)—marked a pivotal turning point in the historiographical revolution of the 1970s and 1980s. Its interpretative methods challenged the conventional social history of the 1950s and 1960s, with its structuralist and sociologising tendencies, as well as the revolutionary paradigms of the *Annales*. Yet the approaches of the French school, along with those associated with *Quaderni Storici*, had radicalised the social sciences in

²⁴ Let us underline here that Murphy’s book (Murphy 2012), quoted above, is deeply impressive; among other things, it demonstrates the affinity between the *Vanity Fair* editor’s reinterpretation of Inquisition history and that of the renowned historian specializing in Inquisition practices in early modern Northern Italy—specifically regarding alleged witchcraft, including “loups-garous” (werewolf) cases. Both authors view inquisitorial practices not merely as historical medieval phenomena, but as primarily instruments of institutional control and surveillance. These practices—including the manipulation and extraction of confessions—have migrated into modern institutions, directly shaping the contemporary bureaucratic-administrative apparatus. Yet, both Murphy and Ginzburg remain keenly attuned to how the traces and clues preserved in the *Archivio* reveal the lived historical reality of those caught within the system.

the 1970s by rejecting, among other things, ethnocentrism and teleology, the legacy of nineteenth-century historiography, which had “equipped historians with unifying concepts and narratives.”²⁵ Besides, what distinguishes Ginzburg’s approach—beyond its challenge to the French serial method²⁶—is that it paved the way for introducing reflexivity into the field of history, an argument to which we shall return later in this text.

Inspired by Freud’s *The Psychopathology of Everyday Life* (1901), the historian—acting as both anthropologist and Inquisitor—traces anomalous, trivial, and insignificant details to challenge the traditional research gaze directed at early modern Italian popular culture. By examining the *subtle traces left by the distinct cosmogonic conceptions and religiosity of social life’s “invisible” people*, the scholar paradoxically renders them visible the moment they fall within the purview of the Inquisition. Ultimately, this approach uncovers social worlds previously deemed insignificant because they left no prominent mark on official cultural history. As the grand historical narrative fragments into micro-histories, the faces of both the condemned and the inquisitors emerge from the official archive. Representing completely incommensurable social experiences and cultures, these figures finally give history a personal name.²⁷ In this respect, in the course of his reflections on methods and their constraints—such as the availability and reliability of evidence and testimony—Ginzburg acknowledged a debt to the insightful conduct of representatives of the high clergy when they acted as historians and philologists to understand popular beliefs and worldviews so strange and alien to their own social world (Ginzburg 1989). Ginzburg reconstructs this role by following clues that pointed to something different from what they apparently indicated.

In doing so, Carlo Ginzburg developed his microhistorical “evidentiary paradigm” by adapting Sigmund Freud’s method of analyzing minute, overlooked clues in everydayness. His methodology posits that deep historical structures and cultural realities can be systematically interpreted by decoding marginal details rather than relying exclusively on grand narratives (Ginzburg 1989). At the same time, far removed from the structuralism of Marxism, Ginzburg demonstrated that adjusting the focus of historical research to individual or collective lived experience serves as a powerful way to connect history and phenomenology.

²⁵ See also the important perspective on the contemporary development of microhistory, as envisioned by one of its earliest protagonists—Edoardo Grendi (Grendi 1994: 539–549).

²⁶ This challenge falls within his evidentiary paradigm, which focuses on evaluating evidence. Critiques of his foundational concepts regarding the difference between evidence and proof prompt a clarification of how these terms relate to each other—a connection that was absent in his first essay. In this context, Ginzburg defends his epistemological perspective—that we must start from seemingly marginal details to grasp the overall meaning of a reality, as he frames it; he emphasizes that his focus on anomalies requires to rethink the concept of a “series” in relation to “cases” and “proofs”. For Ginzburg, the possibility of reading a series of signs as proof is crucial; this concept emerges from his research on art, folklore, and the history of religions, such as his work on the witches’ sabbath. See Ginzburg 2007: 37–47.

²⁷ See Ginzburg & Poni 1979: 182.

Following his extraordinary discoveries concerning popular culture and witchcraft, Carlo Ginzburg continued his rigorous scholarly investigation into minor clues and accidental signs in order to penetrate the hidden realities behind the myths of the ecstatic nocturnal journeys of witches and loup-garous. In doing so, he revealed the morphology of popular beliefs and cult practices. His synthesis of the Eurasian sweep of shamanism in *Ecstasies* helped trace the roots of the witches' Sabbath back through the centuries, all the way to pre-Christian antiquity, and specifically to the shamanism of Eurasian folk culture. By analysing werewolf motifs within European ecstatic fertility cults, the historian traced their ultimate origins to Slavic folklore and Eurasian shamanic traditions (Ginzburg 1966; Ginzburg 1989). While this analytical shift seemingly departed from microhistory, demonstrating that the methodology was not bound to a strictly local scale, Carlo Ginzburg actually illustrated how a folkloric continuum could function as a vital link between collective archetypes and repressed individual impulses. Moreover: Ginzburg defends his approach elsewhere and in a different context, arguing that cross-cultural similarities can help us understand the specific nature of the phenomena from which they arise;²⁸ this path is arduous and requires considerable movement back and forth across time and space, as he says,²⁹ yet it has clearly proven to be a worthwhile investment. At the same time, never losing interest in or passion for these anomalies of early Italian modernity, Ginzburg encounters various cases of werewolves—extending into the neighboring Slavic cultural sphere—which prompted a conceptual continuity that would run like a red thread through his research, from folk beliefs to art: the relationship between history and morphology.

Consequently, this methodological approach motivated Ginzburg to view his scrupulously studied empirical data as a potential theoretical bridge—one capable of reconciling Carl Jung's cultural genealogy with Sigmund Freud's psychoanalytic insights into the unconscious (Ginzburg 1989: 146–155). Based on his research into the archaeology of ideas, beliefs, and attitudes enveloping werewolf mythology—the roots of which he traced back *to peasant popular culture and to ancient spiritual, religious, and magical practices* spread from Siberia through Central Asia to Eastern Europe—the historian takes a critical stance against Sigmund Freud's case on castration anxiety and infantile neurosis of Sergei Pankejeff, a Russian noble and émigré, born in Odessa and belonging to a wealthy landowning family.³⁰

Reflecting on how conflicting historical contexts and cultural backgrounds shape a child's destiny, Carlo Ginzburg reexamined the case of Sigmund Freud's famous patient, the "Wolf-Man," born into an aristocratic family but raised by a Russian peasant nanny. While Freud emphasized the nanny's influence on the child's

²⁸ See Ginzburg, Carlo and Bruce Lincoln. 2020.

²⁹ See Ginzburg 1998: 84.

³⁰ See Freud 1918. Ginzburg always defended the scientific status of psychoanalysis, he applied Freud's approaches as strictly scientific tools.

emotional world and subsequent neurosis, Ginzburg proposed a different interpretation. Rather than viewing the patient as a modern neurotic who feared castration, Ginzburg suggested that he was a man identifying with traditional werewolf imagery deeply rooted in Russian peasant folklore. The historian supposed that these cultural myths were instilled in him during childhood through the rich storytelling of his beloved nanny, who had surrounded him with deep affection. On the dream of Freud's patient regarding the white wolves watching him—a nightmare and phobia that the historian-anthropologist interprets through the lens of mythic archetypes in folk culture, where the wolves beckon the dreamer toward a fated destiny—Ginzburg finds grounds to envision a reconciliation between Freud and Jung, as if allowing for the possibility that personal neurosis and collective myth are deeply interconnected.³¹ It is interesting to note that Freud's the "Wolf-Man" case was published in 1918, a time when Freud sought to highlight the growing tensions between his methods and Jung's, thereby publicly distancing himself from Jung's myth-founded, biologically driven, and archetypal approach. It is as if Carlo Ginzburg wanted to join this debate from a historical distance, lending support to Jung's understanding of the role of myth in human cultural history.

Although this reconciliation aligns with the ideas originally proposed by the world-renowned historian—who explored myths created in the spirit and embellished by the imagination of both the accused and their prosecutors—it continues to compel researchers in interdisciplinary fields of cultural and anthropological studies informed by psychoanalytic theory to proceed with extreme caution in this point. Even studies exploring the pre-Freudian unconscious look beyond strict psychoanalysis—paying tribute to Ginzburg's research into werewolves and the "Wolf-Man"—yet they still fail to reconsider his proposed reconciliation between Jung and Freud (Camilletti 2020). When Freudians enter the debate by distancing themselves from the possibility of reconciliation, it highlights the persistent rejection of Jungian archetypes among psychoanalysts who view the libido as the foundation of the unconscious. Ultimately, this conflict stems from an irreconcilable opposition between defining the libido as strictly sexual drive versus a neutral, non-specific raw life force as Jung redefined libido, until it passes through an archetype.

However, it seems to be no coincidence—beyond a knowledge of the morphology of worldviews and popular cultural representations of werewolves—that Ginzburg turns to this particular case of Freud's psychoanalytical practice. On the one hand, the case remains highly controversial in the history of

³¹ What prompts Ginzburg to revisit Freud's "Wolf-Man" case is the fact that the patient was born "in a caul" (enveloped in the amniotic sac). The boy's nursemaid—who had transferred onto him the love she felt for her own lost child—likely associated this circumstance with myths rooted in rural folk beliefs. While such beliefs, deeply embedded in Slavic folklore, view a child born this way as a happy man destined to do good, the Russian folk tradition identifies such figures with werewolves. So, this cultural childhood context may have influenced Freud patient's nightmare of white wolves starting on him, driving him to this unusual self-identification, from Ginzburg's perspective.

psychoanalysis, especially since Freud saw it as an opportunity to prove to his opponents, who rejected the foundations of his theory, that libidinal drives are of paramount importance in the formation of neurosis. Even among psychoanalysts themselves, it continues to draw significant criticism. On the other hand, the case reflects the influence of historical turmoil, whose confused and dramatic forces overturned the worlds of both patient and psychoanalyst, profoundly reshaping their relationship.³² These same chaotic forces, entirely beyond the control of individual will, went on to exert an immense impact on Ginzburg's own life—a collision that ultimately reshaped the focus of his research (as both his interviews and the researcher's reflexivity on methods show). In this sense, a profound co-affectation between researcher and subject in all probability played a role in such an engagement.

At the very beginning of 2010 Florent Brayard reminds Ginzburg of an interview from 1980 in which he claimed that historians do not write to understand the roots or context of their own lives, yet the process of historical research itself would be of interest to psychoanalysis (Brayard 2010). Although—thirty years later—he appeared skeptical about the efficacy of such an analysis due to what he termed “technical problems” (leading to the age-old “dilemma that no single document is reliable in isolation”),³³ his idea, in some aspects, seems highly relevant, precisely within the context of the tangled motives driving research interest in this specific case involving Freud's analytical methods. While acknowledging that unique microhistories are often expressed and inscribed only through their connection to “grand narratives”—a process mediated by the psychoanalyst—we remain firmly detached from such an experiment, leaving that challenge to the field of psychoanalytical studies (Dimitrova and Nikolova 2013: 159–169). Instead, we focus on the affectedness between subject and researcher, a dynamic which is a vital precondition for reflexivity, in Ginzburg's phrasing;³⁴ for its sake, we are

³² See Gardiner 1972; Pankejeff 1972.

³³ Carlo Ginzburg answers Florent Brayard's rather interesting question as follows: “It would certainly be interesting, but there would be a number of technical problems. Who would speak, the psychoanalyst or the patient? And if it was the patient, how would you know that what he was saying was reliable? You would have a new source, but you couldn't guarantee its veracity.” – “Invisibles constraints”. Interview with Carlo Ginzburg by Florent Brayard, with the support of FMSH. – *La vie des idées*, January 2010. Available at: <https://laviedesidees.fr/Invisible-constraints> [accessed 26 June 2026]. Furthermore, Ginzburg addresses—both empirically and theoretically—the thesis that a single witness is no witness, while revealing the core of the act of witnessing: that the witness cannot be summoned (Ginzburg 1992a: 529–548).

³⁴ “Ginzburg's theoretical and methodological proposals—with their characteristic tensions and suggestive alternative formulations—have always struck me as closely linked to his own work”, which, according to E. Grendi, draws a clear line between cultural and social microhistory (Grendi 1994: 548). In this regard, he adds: “Here we are struck by the unequivocal confirmation of an uncompromising interpretive integrity: the absence of self-contradiction and the experience of self-discovery (revelation, disclosure).” It is worth noting here that E. Grendi's highly analytical and insightful assessment of the trajectory of microhistory as an Italian paradigm serves as a response to certain trends in American historiography—trends that tend to

tempted to focus on some details that could support what we said above about the historian's deeply emotionally charged interest in Freud's study of neurosis.

Carlo Ginzburg was fortunate enough to survive in Fascist and Nazi Italy thanks to the love and support of his maternal grandmother—the only member of the family without Jewish ancestry. During a childhood marked by physical and psychological terror, she gave him a new name borrowed from her own paternal surname—Carlo Tanzi—and inscribed it on the cover of one of his childhood book, which was paradoxically titled “The Happiest Child in the World.” In retrospect, *he would realize that it was precisely then that he became a Jew* (Dayeh 2022: 202).³⁵ It seems to be a very powerful childhood memory—a figure he obviously embodies within a highly affective context from his past. Given the representative nature of the image and its symbolic functions of displacement and replacement—both central to his research—one might infer that Ginzburg identifies as having been born a happy man: he seems driven by a vocational imperative and a messianic impulse through which the past continuously lays claim to him. “Wooden eyes, why are you looking at me?” This quote from Carlo Collodi's *Pinocchio* serves as the motto for his book of reflections on distance—it appears at a time when the “end of history” has become a technical possibility rather than a mere metaphor, especially as our century's amnesia regarding the evils, horrors, and nightmares of the twentieth century grows increasingly menacing. Topics we will revisit.

Carlo Ginzburg notes in *Threads and Traces* (Ginzburg 2012) that he took a long time to realize the biographical connection between his research on witchcraft and the persecution of the Jews, an insight that incorporates reflexivity into the protocols of microhistory.³⁶

Reflecting on his own obsessive desires and drives, deciphering their force behind his addiction to study the reality of persecuted either by Inquisition or by modern unjust judicial system, in a way to voice their truth, the historian recognized that his investigations into how early modern authorities built the myth of the witches' sabbath by co-opting anti-Semitic stereotypes were deeply personal. By untangling these historical prejudices, Ginzburg was tracing the origins of the exact same exclusionary systems that later threatened his own life as a Jewish child in fascist Italy, substantial insight helping him to avoid being overwhelmed by an unpleasant historical past, when it slowly and persistently unfolds its dark enigmas before his eyes' as he delves ever profoundly in the historical persecutive practices transgressing “what must exist by nature” within private low.

celebrate Carlo Ginzburg (both as a historian and as a theorist of the historian's craft) by framing cultural microhistory in purely individualistic terms, thereby seemingly overshadowing the work done in social microhistory. As E. Grendi emphasizes, this has led some American historians to identify Bologna as the birthplace of microhistory simply because they associate the field exclusively with the Italian authors familiar to them—Carlo Ginzburg and Umberto Eco (Grendi 1994: 547). See also Sille 2000 and note 22.

³⁵ See also Mangeot 2007: 71–104.

³⁶ See also Brayard 2010; Dayeh 2022.

Yet, behind this discovery and self-revelation lie years of hesitation, searching, resistance, and the repression of a genetic—or rather, morphological—connection between his interest in the Inquisition trials against heretics and the fact that he is a historian of Jewish descent, born and raised in a Catholic country—a reality deeply connected with both politics and history. His internal crisis is no mere psychological struggle; it stems from the centuries of historical and political upheaval and religious clashes—the heavy hand of the past laying claim to its heirs.

In a 2003 interview, Ginzburg questioned whether historians should explicitly state their subjective motives. Instead of limiting research, he argued that subjectivity expands heuristic possibilities. For Carlo Ginzburg, remaining unaware of this connection was actually beneficial; it freed him from the methodological constraints of an autobiographical link to his topic. At the time, he is rather keen to suppress the idea that his fascination with Menocchio should be viewed through the lens of his own Jewish identity (Gundersen 2003). In a 2022 interview he speaks openly about the link between being of Jewish descent and his deep interest in the Inquisition's prosecution of heresy and witchcraft, just as he did it for the first time ten years before (Brayard 2010). "I was taken aback because the analogy was so obvious—but I had not realized it yet. However, to put it in Freudian terms, I believe that this connection could have worked at a deeper level if it had remained unconscious. In other words, it was part of an unconscious strategy" (Dayeh 2022: 206).³⁷

We dwelt a little longer on the facts and circumstances surrounding Carlo Ginzburg's heavily debated essay on Freud's "Wolf-Man" in the context of his morphological studies of popular beliefs and religiosity. We did so not only because these details demonstrate the historian's highly productive closeness to both Freud and Jung (albeit from distinctly different perspectives), but also because they reveal how and why he turns reflections on methodological hesitations and errors into an integral protocol of microhistorical research. In doing so, Ginzburg introduces both reflexivity to the historian's craft and an awareness of history's experimental nature as a science.

This distinctive conceptualization of the historian's craft lends weight to Eduardo Grendi's insightful yet emotional account of the microhistorical movement as an Italian paradigm. From this context emerges the figure of a specific, individualized microhistorical method—that of Carlo Ginzburg (Grendi 1994: 539–549).

"The historian advances, limping along":³⁸

Microhistory and New Paradigm Shifts

Ultimately, Carlo Ginzburg's interpretive method opened a highly productive interdisciplinary dialogue among history, anthropology, psychoanalysis, and sociology, as demonstrated by his study of folkloric implications in

³⁷ See also notes 13 and 31.

³⁸ Our metaphor draws upon Ginzburg's essays and interviews analyzing the historian's craft—

this well-known clinical case in humanitarian and social sciences. To uncover what the accused witches and heretics truly believed and practiced, Ginzburg strips away the distortions and misunderstandings in their testimony that were often imposed by the categories of inquisitorial interrogations. This approach allows researchers to extract fragments of an autonomous popular culture that would otherwise be lost. Preventing such a loss is vital not only to the historian's craft—which aims to move past grand narratives by exploring the experiences of the lower classes and comprehensively reconstructing the fabric of social life—but also to the work of anthropologists and sociologists. By demonstrating how these beliefs shaped peasant social attitudes and popular cosmogony through the centuries, Ginzburg encourages us to view folklore as a life not static archive through a new lens: as a dynamic space where the tension between a society's shared, ancient archetypes and an individual's hidden, taboo desires is actively negotiated.

Let us recall, too, his "The Inquisitor as Anthropologist" (Ginzburg 2013a: 141–148), included in the book, reassembling his core methodological essays that explicitly arches across multiple fields, inspiring generations of medievalists, ethnologists, and cultural historians alike. In analyzing the ambiguous strategies of Catholic inquisitors in early modern northern Italy, Carlo Ginzburg highlights their paradoxical role within the judicial dynamics of heresy trials. Rather than acting as mere executioners, the inquisitors functioned as reluctant ethnographers caught in an unequal dialogue across the fractured chasm of high and low culture—a dialogue they powerfully framed. To extract confessions, they were ultimately forced to become attentive listeners, inadvertently serving as a vital conduit of cultural exchange between two diametrically opposed worlds. It is no

as "detective, inquisitor, *flâneur*," but above all, scholar who reconstructs the past through fragile traces, fragments, silences, and epistemological gaps left behind by "the slag of history": micro-events, anomalous phenomena, and their invisible protagonists. At the same time, it evokes Natalie Zemon Davis's "On the Limp" (1988)—which itself draws on Michel de Montaigne's essay of the same name addressing the Martin Guerre trial—by playing on Guerre's dramatic courtroom arrival with a limp, the very physical defect that exposed the impostor Arnaud du Tilh. Beyond the historical fraud itself, the "limp" serves as a powerful metaphor for the historical discipline. It frames history as a non-linear, obstacle-ridden practice where the historian, much like a judge, must stumble through flawed evidence and navigate "truths by analogy and resemblance." In doing so, they inevitably transgress the blurred line between fact and fiction—a precarious methodology where, as Carlo Ginzburg once noted, the analogy itself begins to limp (Mangeot 2007: 89). Moreover, in his introduction to the Italian edition of *The Return of Martin Guerre* (Ginzburg 2008: 9–43), Carlo Ginzburg offers a highly insightful and encouraging critique. By drawing upon Davis's passionate involvement in the filmmaking process, Ginzburg deepens the debate surrounding the implications of the indicial paradigm. Drawing upon Davis's passionate engagement with the filmmaking process, Ginzburg advances the debate on the implications of the evidentiary (indiciary) paradigm. He explores how historians deal with the gaps and silences of archives by using the imagination as an intellectual tool to uncover historical truth, while carefully distinguishing between the true and the plausible, and delineating the limits of the historical method.

coincidence that these archives provide such a valuable key to what has long been viewed as the dark and opaque social world of the Middle Ages.

They illuminate intercultural interactions that were previously hard to imagine and, for this reason, long doomed to oblivion. Interrogations are the setting for a unique kind of encounter and psychological confrontation: beyond merely extracting confessions, the inquisitor must construct a specific image and compel the accused to identify with it. While communication with most accused of heresy is difficult, the case of the miller Menocchio is an exception. It is by no means a coincidence that the historian allows him to speak in his own voice—beyond the rights of the dead, which Ginzburg respects, just as he has repeatedly upheld as his narrative strategy.

Carlo Ginzburg remains firmly convinced that historical knowledge is still in its infancy. In his view, given this limitation, historians can only operate within the scholarly field by seeking analogies—even if, to borrow his own phrase, analogy is fundamentally “flawed” or “limps” (Mangeot 2007: 89; Ginzburg 1989; Ginzburg 1991; Ginzburg 2012). While an analogy provides a clear frame of reference for comparing and identifying common traits, it ultimately stumbles when examined through the lens of a micro-analytical approach. Driven by both the objective and subjective, visible and invisible constraints of microhistory, he chooses to examine the heretics and witches themselves rather than merely the trial proceedings. By listening to the silences within the Inquisition documents, he refuses to simply fill in the gaps; instead, he relies on a specific analogy, precisely because his initial research project appears vague and nebulous (Dayeh 2022: 207; Brayard 2010). Combining Gramsci’s and Michelet’s perspectives, the historian’s initial approach to these processes is somewhat naively, treating them as a strict class struggle and framing the heretics as pure rebels. Yet, he quickly discovers evidence of a more profound contradiction beneath the surface—the clash between popular folklore and official religion. This realm remains hidden from authority, accessible only through the prosecutor’s gaze, which is itself deeply distorted by social status, ideology, and power (Ginzburg 1966; Ginzburg 1976; Ginzburg 1989). Having successively assumed the roles of inquisitor and anthropologist, the historian realizes that the fundamental problem lies in the breakdown of communication between judge and accused, in the absence of the conditions for its possibility. By analyzing the inherently asymmetrical power dynamics between the accused and the accuser, the author examines the socio-political impact of these processes, which form the very foundation and mechanism of modern prosecution. In doing so, he *bridges symbolic and interpretive anthropology with cultural microhistory*, framing his study within the landscape of *religion and religiosity in early modern Europe*. While cultural anthropology largely reinforces the opposition between the “cultural” and the “social” (according to Edoardo Grendi), the study of popular beliefs in relation to the power blurs the boundary between these two concepts within a microhistorical practices, that is actually what Carlo Ginzburg advocates for.

Challenging as this research context is, the microhistorian has always carefully distinguished *between analogy, similarity, and genesis*. He demonstrates this across both empirical and theoretical studies, whether delving into popular beliefs and the relationship between the Hebrew Bible and the Gospels, or analyzing images and representations.

In this context, it is worth highlighting the pivotal role of a particular scene of Carl Dreyer's movie "The Day of Rage" (1948)—one that functions as a stroke of fate, captivating Ginzburg and anchoring his long-standing interest in the dynamics of the inquisitorial trial, insofar as this process, in turn, reveals the human condition within the framework of incommensurable worlds.

I did not believe in magical powers and my initial choice was to work on the attitudes of the victims of persecution. In that moment, I had not realized that there was something paradoxical about that project since the inquisitors, who generally made use of torture and suggestive questions, had turned their questions into answers (Dayeh 2022: 206).

In confessing the intimate experiences that reflect his unconscious drive to touch the core of history's dark side—marked by violence and structural inequalities—Carlo Ginzburg continues to witness to the integrity of his method during a pandemic-era conversation with Islam Dayeh (Dayeh 2022: 197–232). After nearly forty years, he reveals a further catalyst for his strategic choice to counter archival silences and illuminate marginalized historical subjects through the lens of witchcraft—a cultural and social phenomenon darkly tainted by the Inquisition—noting how profoundly he was moved by this film about an elderly woman accused of the witch's crime. He recalls his shock at watching the judges debate her case—seemingly rational people dressed in elegant seventeenth-century attire—which fueled his desire to explore an unpleasant past that had been suppressed for centuries under the weight of its own challenging facts.³⁹ Apparently, there is something more behind the Inquisitor's mantle; behind the cold rationality of power flickers another shadowed historical reality: invisible yet deeply significant, waiting to be deciphered.

³⁹ In this context, insofar as Carlo Ginzburg's shared experience resembles situations of mutually affected being—a precondition for a traumatic past to encounter its heirs—this case is symptomatic of the cinematic paradigm's potential for experimental history. By capturing even, the smallest detail at the very moment of its occurrence, the camera's impartial eye allows us to encounter the past as something living—and history as an embodiment of the present—insofar as it is precisely within cinematic images that the figure of the witness as a living body, and of testimony as a unique (lived) experience, are constituted (Dimitrova and Nikolova 2013: 159–169). Affects can persist unchanged in the unconscious, retaining their power for years—much like a "foreign body", in Freudian sense. Stored in the body as if in a repository, affects can be reawakened, and the past can—like a "flash of lightning" (in Benjamin's wording)—burst into the present through a sudden encounter with something material: the image of the old woman facing the judges, for instance, in the case discussed by Carlo Ginzburg. See note 41.

Given this context, it is hardly surprising that, precisely in his role as a researcher of the hidden reality of witch and heretic trials, he realizes he is also caught in a trap—albeit a different one—as he confessed in this inspiring essay (Ginzburg 2013: 141–148). On the one hand, he grasps that he is beginning to experience a special sympathy and even a kind of identification with the victims. While recognizing that he must act as an inquisitor by interrogating these individuals to shatter the deep-seated silences and lies that have surrounded them for centuries, he ultimately finds himself intellectually aligned with the inquisitor yet emotionally bonded with the victim—a deeply uncomfortable and frustrating research process that he studies scrupulously, and thematizing in several interviews.⁴⁰ Although paradoxical at first glance, Carlo Ginzburg subtly and elegantly directs the focus to reflexive history as he attempts to understand his own position as a researcher of the Inquisition archives. Behind this moral horizon—expressed here as a responsibility for the silences and gaps within the archive—lies his unusual, seemingly self-imposed obligation to the past. This obligation requires the historian to be exceptionally careful and cautious with the methods used to make documents speak. Read in this way, the fragile traces of these historical collisions prevent “dishonorable people” from sinking back into the historical non-existence where they have long resided. This perspective is precisely what encourages the researcher to openly share his shortcomings and mistakes. Rather than fearing the exposure of his hesitations and doubts, the scholar—impressing readers with his honesty toward the research process—transforms them into a rigorous method on the path to historical truth. Ultimately, this approach is deeply sensitive to Antonio Gramsci’s insight regarding the vital importance of understanding exactly why the enemy won (Ginzburg 1999a).

Let us summarize. Judicial proceedings are deeply similar to ethnographic fieldwork—in both settings, the communication between the questioner and the subject is inherently unequal. To navigate the dynamics of this power asymmetry and the hidden violence it creates, researchers must remain highly reflexive and attuned to these potential pitfalls. As Ginzburg demonstrates, reading “between the lines” means grasping the silence and

⁴⁰ “Gradually I discovered that there is sometimes a complex relationship between the historian and the inquisitor: emotionally I identified with the defendants, and intellectually I was disturbingly close to the inquisitors. I had a clear conscience when I wrote *The Night Battles*, but that soon disappeared when I realized how uncomfortably close I was to the inquisitors.” – “Invisibles constraints”. Interview with Carlo Ginzburg by Florent Brayard, with the support of FMSH. In: *La vie des idées*, January 2010. Available at: <https://laviedesidees.fr/Invisible-constraints> [accessed 26 June 2026]. See Ginzburg 2013a: 141–148. The extent to which he is deeply affected by this revelation is evident from the fact that he rarely misses an opportunity in interviews to clarify the source of his initial sense of unease. Faced with these confusing emotions and his own identification with the subject of study, he invariably draws attention to the affective dimension of the research process (Gundersen 2003; Mangeot 2007; Dayeh 2022). See also Tarantino 2014: 123–127; Arnold 1998: 379–386; Dimitrova 2009: 1–47; Dimitrova 2019: 150–197.

deciphering the raw resistance concealed within it; the reconstructed dialogue with Menocchio has inspired an entire generation of researchers to delve into this type of document.⁴¹ When researchers face a compromised archive—which masks rather than mirrors reality—they must remain highly sensitive to the implications of their work. To avoid the twin risks of colonizing or idealizing their subject matter, historians must conduct double investigations—examining both their own analytical procedures and the methodology on which they are based. Consequently, the microhistorical method requires historians to document their investigations as meticulously as an anthropologist keeping a field diary. Almost ten years later, the historian Carlo Ginzburg introduced the significance of distance and its moral implications in the controversial relationship between universal and private law in his book *Wooden Eyes*.

Furthermore, a rigorous analysis of our personal reactions, assumptions, biases, and emotional responses to archival data is a vital prerequisite for transforming the emotional resonance—or “co-affection”—between researcher and subject into an innovative paradigm. However, this methodological approach requires a delicate balance: the fragmented archive of trauma and suffering must not strip the scholar of scientific objectivity, while the distance of theoretical detachment must not stifle the profound silences that signal the incommensurability of lived experience. Maintaining this balance and paying attention to the “red signal light,” in Ginzburg’s phrasing, allows us to reconsider the heuristic potential of “mutually affected being” as a condition for sharing traumatic experience (Dimitrova and Nikolova 2013: 162)⁴²—an argument to which we will return. The historian first encounters this peculiar

⁴¹ See Tarantino 2014: 123–127; Arnold 1998: 379–386; Dimitrova 2019: 150–197.

⁴² By insisting—within our research practice—on opening up alternative archives and linking them to the paradigm of trauma, we do not call for the discovery of novel archives hidden in institutional storage that harbor the truth of the past. Rather, we emphasize the archive as a lived experience, viewing the encounter with it as an event unfolding between the researcher and subject through a mutual capacity to affect and be affected—a situation that fosters a critical and reflexive stance toward pre-established, tested, and seemingly operational theoretical tools, while remaining mindful of the pitfalls of relativism. This approach addresses the inherent limits of language in communicating trauma—a crisis central to totalitarian and concentration camp testimonies: the nightmare of survival, where victims fear they cannot recount what happened because no one will believe them. To articulate “the ugly and the unimaginable,” we rely on imagination and an environment of “reciprocally affected being” to overcome the fear of disbelief. We documented the research protocol of such a process—of mutually affected subjectivities—as a gateway to hidden, fragmented archives of the excluded. By transforming this shared affect into a rigorous methodology, civic stance, and cultural mindset, we honor the irreplaceable nature of testimony: the fact that a witness cannot be summoned by right (Ginzburg 1992a: 529–548); a witness exists as such only insofar as they and their testimony are inseparable in time and space (Agamben 1999). Through this practice, we actively challenge an indifferent, transition-era media and test Carlo Ginzburg’s assertion that solidarity with distant people is merely rhetoric (Ginzburg 1998: 209). See: Dimitrova and Nikolova 2013: 155–165; *Sociological Problems* 2010; *Sociological Problems* 2011. *Special issue*; Dimitrova 2009: 1–47.

factuality when examining the trials of heretics and witches—an experience that evokes ambivalent and unsettling feelings. Grappling with these emotions becomes a precondition for a reflexive history, framing the path toward the affective turn in historiography, as we must underscore once again. (Ginzburg 2013: 141–148).

Carlo Ginzburg's analytical, deeply perceptive, and influential books on the interactions, conflicts, and socio-cultural distances between “high” (elite) and “low” (popular) culture garnered widespread international acclaim. As a historian of secular diaspora Jewish heritage, he excavated obscure dimensions of early modern inquisitorial practice in order to deconstruct prevailing ideological biases and historiographical prejudices. By extension, his work stimulates new research delving into the popular culture of the 16th–18th centuries, continuously illuminating the historically marginalized, anonymous, and heterogeneous world of ordinary men and women from the lower social strata.⁴³ This challenges the monolithic narratives imposed by dominant cultural and institutional norms; on every occasion, Ginzburg never fails to underline how strongly his interests are influenced by Gramsci's studies on subaltern classes, moreover in his interview he confessed how he has realized why Gramsci uses subaltern class as a substitute term for proletarians.⁴⁴

By grounding his research in a diverse array of sources, including iconographic artefacts, folklore materials, literary texts, and fine art, and juxtaposing them with the deeply compromised documentation of the Inquisition, the historian navigated an archive defined by epistemic gaps, deliberate omissions, and coerced testimonies. In this context, the methodology of the atheist Jewish historian—which engaged deeply with both the lacunae and fragments of the dominant Inquisition archives and the “historical slag” (i.e., what remained outside historians' purview, and the reasons for this) through the analytical lens of cultural and social history—carried significant theoretical and empirical implications. These choices, finally, lay at the very centre of the historiographical revolution of the 1970s and 1980s, particularly the rise of microhistory within the critical interrogation of archival power and essentialist logic of the eventful-centered, traditional historiography's categories.

⁴³ Take, for example, Roger Chartier's books on reading, popular culture, and intellectual life of 16th–18th centuries, as well as Natalie Zemon Davis' empirical and theoretical books on the silences and gaps of the archives, the linkage between history and cinema, and the cultural and social history of early modern France.

⁴⁴ As Ginzburg recalls, “I realized that as he was writing from jail, Gramsci was both circumventing fascist censorship and distancing himself, willingly or unwillingly, from the language of the Third International. For instance, he used the word ‘subaltern’ instead of ‘proletarian.’ [...] So, you can see that Gramsci's international impact was related to those words and to how he reflected on them” (Dayeh 2022: 205).

I believe that I heard of microhistory for the first time from Giovanni Levi in 1977 or 1978, and I adopted this previous unheard-of word without asking what it mean literally. I suppose I contented myself with the reference to a reduced scale suggested by the prefix ‘micro.’ I well remember, too, that in those early conversations we spoke of microhistory as if it were a label attached to an empty container waiting to be filled. Some time later, Levi, Simona Cerutti, and I began working on a series titled precisely *Microstorie* published by Casa Editrice Einaudi in Turin.⁴⁵ Twenty-odd volumes by both Italian and foreign authors have appeared; a few of the Italian works have been translated into other languages. In some quarters there has been talk of an Italian school of microhistory (Ginzburg 1993: 10).⁴⁶

⁴⁵ Carlo Ginzburg’s father was a founder of the Einaudi publishing house—“His father, Leone Ginzburg (1909–1944), born in Odessa into a Jewish family that migrated to the West, first Berlin, later Turin, was a writer, professor, translator of Russian literature, [...] and hero of the resistance against fascism” (Guerreiro 2020). Within the same interview, the historian continues to untangle the clew of motives and influences in order to piece together how his idea of microhistory took shape: “During the war, my father revised the translation of War and Peace. I wrote an essay on microhistory where I talked about what I learned with Tolstoy and the challenge that he posed for me. He was the one who taught me that in order to relate a battle we should relate the experience of everyone who participated in it. *Not only the general’s experience but also that of the humblest soldier. In retrospect, my idea of microhistory stems from there*” (Guerreiro 2020). Later, Ginzburg adds the works of Erich Auerbach to the influences that shaped him as a microhistorian (Ginzburg 2005), while both Gramsci’s and father’s figure are presently persisting behind his historian’s passions, paving his carrier as witnessed by his reflexive works and interviews.

⁴⁶ Referring precisely to this text, Edoardo Grendi notes that Carlo Ginzburg seems to confirm his own analysis of Ginzburg’s vocation for microhistory—understood as a highly individualized approach to cultural forms within specific historical and historiographical contexts. Because both articles appeared in the same issue of *Quaderni Storici* under the *Discussioni e Letture* section, one can hardly surmise that Grendi’s text (Grendi 1994: 539–549) was written in direct response to Ginzburg’s piece (Ginzburg 1994: 511–539). Nevertheless, it is evident from the content that Grendi had clearly read Ginzburg’s article prior to publication. In all likelihood, the discussion was conceived to delineate two distinct fields of microhistory—the cultural and the social—by inviting two prominent figures in these areas to outline them. It is possible that the discussion itself was prompted by the publication of Ginzburg’s article in the autumn of 1993 in the renown American journal, (Ginzburg 1993: 10–35) and it seemed natural to be continued in the pages of the famous Italian journal, inseparable from the history of this paradigm. In his article, Ginzburg does not mention Grendi—a pivotal historian of his generation who was dedicated to institutionalizing microhistory through this globally influential journal and popularizing it through his teaching in Great Britain. Notably, Grendi’s conception of “the normal exception,” alongside his theorizing on microhistorical social analysis (Grendi 1977: 506–520), revolutionized the field and bridged the analytical approaches of social anthropology and microhistory; in its turn, Ginzburg does not fail to underline the innovative potential of this approach of E. Grendi, when he also casting a glance back, rethinking a paradigm—the indiciary one (Ginzburg 2007: 37–47). The scholar passed away in Nottingham at the age of 67. The name of Carlo Poni is also missing from the passage in Ginzburg’s text that outlines the early stages of microhistory. The two scholars had co-authored a conceptual article on the field’s methodology (Ginzburg and Poni 1979: 181–190), suggesting that Ginzburg may have been focused on distinguishing his own approach within microhistory. Poni, an esteemed economic historian and a pioneering founder of new paradigm, later passed away in New York at the age of 91.

As one of these beginners, Carlo Ginzburg did not merely try to fill this conceptual container;⁴⁷ he gave the word an entirely new meaning after discovering that it was, in fact, full of hidden connotations after his “small retrospective investigation into terminology.” As an secular Jew passionately devoted to the historian’s craft, Carlo Ginzburg participates in critical debates surrounding historiography, politics, and historical truth. Throughout his academic career, he argues that practicing microhistory required a dual commitment: transforming the archive into an analytical category without ever losing sight of a vibrant micro-level perspective. Sustaining this devotion required an exceptionally active and prolific engagement in deep methodological discussions, alongside an open acknowledgment of the errors and omissions in one’s own investigations. “Loyalty to principles is not enough; we must first and foremost critically reflect on our analytical tools and on ourselves,” Ginzburg once firmly stated, stressing his simultaneously intimate and distant position regarding Perry Anderson’s work, which he felt lacked self-criticism (Ginzburg 1999a).⁴⁸ Fully aware that this term was for decades “shrouded in an aura of bureaucratic coercion and hypocrisy,” Ginzburg remains highly sensitive and reactive to what he perceives as a lack of criticism regarding one’s own research. Such firmness stems from his conviction that historical truth is discovered not only through the accumulation of data, but also through a rigorous analysis of the gaps, anomalies, semi-silences, semi-truths, and fragmentary and fractured accounts left behind by witnesses to historical phenomena, events and processes.⁴⁹ Facing this challenge effectively is the ultimate stake of Carlo Ginzburg’s paradigms—an effectiveness, in fact, that demands a clear researcher’s consciousness that

⁴⁷ When speaking about the beginnings of microhistory as a collective analytical proposal, Carlo Ginzburg does not fail to mention Giovanni Levi as a colleague and intellectual ally. He adds a more personal dimension in one interview, discussing the shared intellectual connoisseurship that brought them together (Dayeh 2022: 202–203). Contributing greatly to this field, Levi became widely acclaimed as a co-founder of the microhistorical paradigm by developing its social dimension, which originated in Italy, and, for its part, also delineating a boundary between cultural and social contextualization within microhistorical practice. At the same time, E. Grendi—referencing G. Levi’s text “On Microhistory” (Levi 1992: 93–113)—notes that Levi’s account of how the label “microhistory” was chosen differs from Ginzburg’s. Levi’s account is notably idiosyncratic, reflecting the scholarly trajectory of a historian who was an experimenter by vocation—someone for whom the sustained pursuit of a single research topic was entirely natural (Grendi: 545). When I later discovered this analytical text by Levi, it relieved me of the frustrating sense of unease I had felt about having worked on the case of Dorina Ilieva-Simpson for over fifteen years, and it gave me the resolve to resist both my hesitations and the outside elegant pressure to abandon the project of SEES, UCL (Dimtrova 2010: 53–83).

⁴⁸ This is a letter Carlo Ginzburg addresses to Perry Anderson on July 1999. See the Correspondence Carlo Ginzburg & Perry Anderson, published in *New Left Review*. Available at: <https://newleftreview.org/issues/ii160/articles/correspondence> [accessed 25 July 2026].

⁴⁹ See Ginzburg 1966; Ginzburg 1976; Ginzburg 1989; Ginzburg 1997; Ginzburg 1998; Ginzburg 1999; Ginzburg 2005; Ginzburg 1992; Ginzburg 2012; Ginzburg 2013; Ginzburg 2015; Ginzburg 2018; Ginzburg 2022.

The prefix ‘micro-’ was not related to the dimension, either real or symbolic, of the object under scrutiny, but to the depth of the scrutiny itself an allusion to the microscope;⁵⁰ anything can be put under the historian’s microscope—an unknown individual or a famous event” (Ginzburg 2016: 12).⁵¹

Choosing not to turn his gaze away from the slag of history—into which the lives of those who “seemingly never lived” have been transformed—while practicing a specific reflexivity to ensure his researcher’s view remained honest and transparent, Carlo Ginzburg performed an almost Copernican revolution in historiography. Attuning his work to what he elegantly termed, borrowing from Baudelaire, as “if never existed,” referring to anonymous and unknown individuals, he explored the social and political invisibility, greyness, and marginality of centuries past, inspiring us to focus deeply on the minimal, the abnormal, the incidental, and the ordinary. A passionate historian who shared the sensibilities of his favourite poets, Carlo Ginzburg subtly taught us how to look beneath grandiose, idealised, and ideologised narratives. Instead, he guided us to seek out what had been deemed superfluous, negligible, or socially and culturally neglected.⁵²

At the same time, however, Ginzburg is careful to distinguish the microhistorical approach to this “slag.” The stakes are not simply to shift focus toward underprivileged and subordinate classes, but to tune the lens of the mi-

⁵⁰ “My grandfather was particularly important for me. In retrospect, I think that *my reaction to the idea of microhistory, which alludes to the metaphorical use of the microscope, was in some way connected to him*. He once invited me to have a look at the microscope in his laboratory, but I was deeply disappointed, which I did not dare to tell him, as Ginzburg continues bearing witness how deeply personalized is his relation to microhistory” (Dayeh 2022: 201). His grandfather, Giuseppe Levi, was a renown histologist, professor at Turin University, an intellectual Jew, and a survivor of the Second World War (Ginzburg 1963).

⁵¹ Nevertheless, Carlo Ginzburg appears less concerned with labels, stating, “One might call this approach micro-history, but labels are ultimately irrelevant” (Ginzburg 2005: 665). Indeed, he provides a theoretical justification for the metaphor of the “cognitive shift” (coined by Giovanni Levi)—likening it to the movement of a camera lens navigating a vast, interconnected world. At the same time, Ginzburg endorses Eric Auerbach’s analytical strategy in literature and philology, which, as he notes, was originally inspired by Proust and Woolf. Drawing on Auerbach’s *Mimesis*, Ginzburg explores how focusing on concrete details and dispassionately presenting random moments from ordinary people’s lives—such as the colorful life of Jean-Pierre Purry, a Swiss-born Calvinist—allows researchers to inductively reconstruct global processes from specific micro-observations, rather than relying on abstract categories. Through a close reading of the tracts by Purry, after whom an American city was named, Ginzburg demonstrates that drawing strict lines between social and cultural microanalytical approaches is unjustified, thereby dismantling the barriers between microhistorical analysis and macro-level theory (Ginzburg 2005: 665–683).

⁵² A recurring theme in various tributes and farewells to Ginzburg speaks volumes about the impact of the way he—acting as both anthropologist and philologist—brings marginal worlds into our view: namely, gratitude for his sensitivity toward social outcasts, who are often excluded as “the other.”

croscope for an exceptionally rigorous, detailed, and critical examination. This makes a crucial distinction between Siegfried Kracauer's widely shared concept of microhistory (Kracauer 1969) and the theory and practice of microhistory developed by the 1970s' Italian historians as Ginzburg does not fail to underline (Ginzburg 2016).

Privileging random life events, and anomalies as a starting point is bound to encourage the disentanglement of the micro-archive from the macro, serving as a clear, reflexive procedure within the researcher's analytic methodology. Fully aware of the official archive as a site of powerful control, the historian is not limited to researching what is inside the boxes. Instead, they must go further by questioning what kind of knowledge has been produced through the structures and silences of the archive. Their answer to powerful censorship and control is always to look into these gaps, giving voice to the silenced who—regardless of the political system or regime—were meant to remain voiceless and powerless.⁵³

A special reflexive position that prevents us from forgetting ourselves and becoming “a kind of Inquisitor”—the final authority on historical truth, particularly given that the historian deals with individual and collective defeats of an impressive scope and reach. Practically speaking, this means maintaining absolute honesty about the pitfalls we stumble into when our methods obscure rather than illuminate historical reality, or when they continue to ideologize and politicize instead of decolonizing.

Furthermore, highly sensitive to a given name as a site of self-identification, and sharing the ethics that make a historian morally loyal to the rights of the dead, Ginzburg's co-authored text shows the importance of extracting the

⁵³ Drawing on empirical findings and specific case studies, this analytical approach addresses foundational concepts in the contemporary social sciences, such as *trace*, *process*, and *singularity*. Here, turning to the conventional official archive by shifting the scale of analysis, is bound to produce a fragmentation of micro-narratives into numberless separate paths of ongoing violence and injustice (uniqueness of one's own past), while maintaining a clear view of the grand historical narrative. When a microscopic lens focuses on an individual's name and specific experience, a “micro-archive” emerges within the macro-archive. It is precisely through this process that the “fiction of the archive” is revealed, unraveling both the intrigue of a human life and the narrative arc of a personal drama. This real-world dramaturgy arises from joy and success as much as from pain, fear, anger, and contempt. It is precisely this affective reality of historical experience that leaves traces within the conventional archive. Found on small slips of paper bearing personal names—such as petitions, fines, and interrogation records—these traces disrupt archival order, documenting the individual's daily confrontation with power. Long dismissed as historical scoria, they have become the focus of critical analysis within microhistory's paradigmatic turn. These slips of paper materialize normative contexts, transforming affect into a visible repository of the conflicts born of socialization (in the Freudian sense). They trace a painful reality: what specific historical processes, discourses, and institutions have stripped from me. At the very least, what is at the pledge here is how they bear witness to the socio-political networks that shape both collective intersubjectivity and the deeply personal “mine-ness” of experience—which is inseparable from the social tissue and political reality of a given historical time.

deeply personal experiences from official archives. In this context, the name acts as a red light that keeps the historian from being overwhelmed by the official archives: “Ariadne’s thread, which leads the researcher through the labyrinth of the archives, is what distinguishes one individual from another in all known societies: the name” (Ginzburg and Poni 1979: 185). Thus, it achieves accuracy by preserving the lived experience tied to the personal name, thereby introducing the individual into history—individualization, however, challenges both the objectifying attitude toward the past and an excessive proximity to the object, simultaneously undermining the content and essentialist logic of grand narratives (including their basic terms and concepts).⁵⁴

A shift toward a new historiographical paradigm is emerging—one whose theoretical toolkit enables the conceptualization of the past through the prism of *lived experience*, and to some extent, Søren Kierkegaard’s legacy is being assimilated, a legacy concerned not only with the structures of existence but also with the uniqueness of human experience: one that insists on situating the individual within history through existential categories. This approach creates the necessary conditions for integrating a phenomenological perspective into historical research. While proponents of the *Annales* school increasingly draw upon the theoretical arsenal of sociology and anthropology, microhistory—as conceptualized by one of its founders—remains methodologically linked to philology, philosophy, morphology, and psychoanalysis. To think and understand the microhistorical movement as developed in two fields is sustained within the perceptive critics of French annalist tradition (Revel 1989: I–XXXIII).

Carlo Ginzburg’s pioneering books were followed by numerous others, often composed in the form of essays and employing an experimental style reminiscent of film editing. As he stressed in the preface to the Bulgarian translation of *Occhiacci di legno*, this style was strongly influenced by Sergei Eisenstein’s films and theoretical writings, beginning with his famous essay on the origins of the close-up.

⁵⁴ In “Latitude, slaves, and the Bible: An Experiment in Microhistory”—one of his perceptive essays—Carlo Ginzburg, inspired by Erich Auerbach’s concept of *Ansatzpunkte* (collecting of the starting points), addresses the theoretical foundations of microhistory, challenging the perceived opposition between its literary-interpretative approach and its social-scientific counterpart (Ginzburg 2005: 665–683). The author argues that this dichotomy is groundless, as both methodologies ultimately target the same theoretical objectives from different angles. Consequently, the text critiques the conventional social-science view that equates theory exclusively with macro-approaches (such as Max Weber’s) while relegating microhistory to an atheoretical, peripheral effort to rescue marginalized lives. By introducing the case of Jean-Pierre Purry—an early proponent of global capitalist conquest—and through close-up readings of his tracts (“Mémorial on the Land of the Kaffirs, and the Land of Nuyts, in relation to the usefulness that the East India Company could derive from it for its trade”), the author demonstrates how a single, seemingly random life can concretely illuminate abstract global processes, thereby undermining the sharp distinctions between microhistorical analysis and macro-level theory.

I guess I would start from the subtitle: “Nine reflections upon distance”, which I would tentatively paraphrase as “Nine close-ups”. Somebody might immediately object that a close-up—a visual metaphor taken from cinema—suggests physical closeness, i. e. the opposite of distance. But as the reader of my book will immediately realize, these reflections on the cognitive and moral implications of distance imply a close reading of texts and images. In each essay a specific topic is submitted to a close scrutiny, aiming to unfold the topic’s larger implications. Likewise, in a movie a close-up can be connected and/or opposed to a long shot by montage. I felt the impact of Eisenstein’s work and reflections long before coming across *History: The Last Things before the Last*: the book in which Siegfried Kracauer analyzed the relationship between micro and microhistory relying upon the cognitive implications of montage (Ginzburg 2016: 11).⁵⁵

In these seminal essays—indispensable for grasping the philosophy of Carlo Ginzburg as a co-founder of microhistory—the author continues to highlight the potential of the method, giving new theoretical and empirical density to the microscope metaphor. The researcher, who has already amassed a magisterial and influential legacy including deep, close-up analyses, adds to this his compelling reflections on the intertextual relationship between the Hebrew Bible and the Gospels (Ginzburg 1998: 100–117). Displaying his characteristic evocative grasp and scrutiny in *Wooden Eyes*, Ginzburg shifts the microhistorian’s focus into a distinct perspective, offering powerful insights into the tension between objectivity and intimacy, as well as distance and proximity. In one of the book’s comprehensive analytical scenarios, the author explores the profound moral, social, and political implications of the clash between written private law (codified, state-enforced) and unwritten common law (as a universal moral imperative) in everyday life (Ginzburg 1998: 194–209). By tracing their systemic frictions, conflicts, and dialectical interactions across history, reality, and myth, this study draws context from foundational texts ranging from Aristotle’s *Rhetoric* to the Enlightenment treatises of Diderot, Sade, Hume, and Chateaubriand.

⁵⁵ This method and style also resonate with the design of *The Cheese and the Worms*, adding an aesthetic dimension to the investigative, civic, and ethical layers of the microhistorical paradigm (Dimitrova and Nikolova 2013: 159). This quote is from an original English text sent to me by Carlo Ginzburg as an Author’s Note for the Bulgarian edition of his *Occhiacci di legno*—the only book of his translated into Bulgarian so far. The book was published by the Critic & Humanism publishing house. The idea to translate this specific book, its ultimate realization, and all subsequent Bulgarian translations of his articles—which engaged Ginzburg in a highly productive debate on historical truth within the journal *Sociological Problems* (*Sociological Problems* 2010; *Sociological Problems. Special Issue* 2011)—were among the core scholarly aims of the project: “Crisis of National Identity: The Challenges of Microhistory as Research, Ethical, and Civic Paradigm (Case Studies),” 2009–2012. It has been funded by Bulgarian Ministry of Education (Bulgarian National Science Fund).

Incorporating Walter Benjamin's understandings and intuitions on capitalism and the claims of the past, this framework yields analytical tools for interpreting signs of the suppressed past within the present, where the future unfolds.

The rewards of this impressive intellectual audacity and erudition lie in analyzing, across time and space, a classic opposition bequeathed by the ancient Greeks: the conflict between *universal unwritten law and history itself*, the history, by all appearances, is not just. The text delves into the very core of the evil that shapes the shadowy horizons of human destruction—specifically the darkness of wars, global cataclysms, and an ever-deepening abyss of inequality, beyond which the vast field of injustice continues to unfold, along with hidden involutions and evolutions within human lives and historical processes. Rather than dissipating during the lifetime of Carlo Ginzburg's generation of war survivors, these shadows have only thickened with the march of technological progress, capitalism, and communism. Driven by the moral obligation of intellectuals marked by individual and collective wartime traumas—which, in Ginzburg's case, seems to stir the “weak Messianic power to which the past has a claim”, in Benjamin's phrasing—the historian analytically reveals why he is not *afraid to consider the expansion of our empathy toward distant and alien beings as a merely rhetorical act* (Ginzburg 1998: 209)

With his keen eye for detail, Ginzburg detects an unwarranted, sexist nuance in a 1926 edition of Aristotle's *Rhetoric*—one entirely absent from the original text; it appears in the example of Antigone and her right to bury her brother. While the philosopher invokes the myth to illustrate the clash between universal (unwritten) moral law and particular (written) law, the historian draws upon Aristotle's reasoning—and that seemingly minor editorial distortion—to reveal what actually renders “our moral imagination” so much weaker than our capacity for destruction (Ginzburg 1998: 194–196). By doing so, he adopts Aristotle's philosophical stance that investigates how the just and the unjust are understood in relation to the two laws and the people to whom they apply. Following the logic of his arguments, Ginzburg further integrates emotions into these connections and relationships by tuning his researcher's microscope toward literature and philosophical texts to disclose the role of affects in both distant and face-to-face interactions, particularly when the power of universal moral law is questioned by private law, and vice versa.

Capitalizing on this editorial oversight—which masks centuries-old historical transgressions—Ginzburg makes two crucial clarifications. On the one hand, he points out that the unwritten law in Aristotle and Sophocles (that which exists “by nature”) is gender-neutral and transcends temporal and spatial boundaries. On the other hand, he emphasizes that in the second book of *Rhetoric*, Aristotle does precisely the opposite by imposing spatial and temporal limits on emotions (such as compassion and envy), which are phenomena that likewise exist “by nature.” Conversely, according to the historian, geographical and temporal limitations do not apply to the reality of myth; as Carlo Ginzburg maintained, ancient

figures can evoke deep emotions—especially on stage, as Aristotle himself argued—regardless of when or where we encounter them. A precondition for this to occur lies in an interplay of scales, which the erudite historian views through the distinct lens of distance and proximity. While distance diminishes our emotional responses, proximity intensifies them: one case is characterized by indifference and apathy, and the other by compassion and envy. Both modes generate relationships with moral implications for universal and private laws. This profound ambivalence, famously embodied in ancient drama, offers a glimpse into the society of the time; as Carlo Ginzburg reminds us, according to Aristotle, tragedy deals precisely with events that evoke “fear and pity” (Ginzburg 1998: 196).

But why does this reality remain unchanged two millennia later? Searching for answers to this frustrating question, the historian arches diverse geographies and eras, offering a close-up analysis of the lesser-known nuances within treatises and novels by philosophers and philosophizing writers. Each author explores how distance and proximity—across both the horizontal and vertical axes of human relations—shape the moral dilemmas of everyday life. Will you forget that you committed a murder simply by fleeing to the other side of the world—to China, for instance? Will a guilty conscience truly vanish as you distance yourself physically from the place and mentally from the event over time? Does a doctor have the moral right to treat a criminal? Should humanism be unconditional? When values clash, where does true justice lie—with pure morality and human relationships, or with the strict letter of the law? Would you kill a stranger in China from the comfort of Paris using only your thoughts, if that remote crime brought you immense wealth and neither the law nor society would ever find out? Is it merely the fear of punishment that makes us moral? If you save a persecuted person—for example, a Jew during a time of systemic persecution—why do you do it? Is it because they are a close neighbor you know personally, or simply because they are a fellow human being, equal to you?

By addressing and problematizing the complex emotional geometry of human relationships—ranging from *distance and moral empathy to intimacy, revulsion, and rivalry*—the historian is primarily concerned with one question: to what extent the universal moral law retains its transcendent and eternal character. This question is particularly pressing given that, throughout the course of individual lifetimes and collective history, the dialectical clash between unwritten and written law has exacted a toll of millions of lives, ceaseless wars, and widespread devastation. Today, fortunes are easily amassed from afar at the expense of ruined lives—or as Zygmunt Bauman observes, stealing an ice cream is a criminal act, but destroying the economies of developing nations brings high rewards (Baumann 1998). With similar ease, ordinary people can be transformed into a battalion of killers targeting Polish Jews—as Christopher Browning demonstrates⁵⁶—or a pilot can press a button on a bomb-laden airplane when targets below look no

⁵⁶ See Browning 1992.

larger than swallows (Diderot's moral anxieties). This ease with which destruction is dealt constantly tests the limits of human morality and the power of emotion, empirically supporting the observations of the Enlightenment encyclopedist: the blind sees the world differently than we do. Carlo Ginzburg suggests Diderot is correct—*morality arises under specific circumstances and is bound by physical and historical limits*. Consequently, in today's world—marred by the cruelties of inequality—our apathy and indifference amount to a form of complicity, as Ginzburg insists (Ginzburg 1998: 206). Furthermore, under specific historical conditions, David Hume's claim that our actions cannot change the past is effectively rewritten. As Ginzburg rightly notes, our acts can destroy historical traces, condemning thousands to oblivion and allowing the memory of the past to be distorted beyond recognition by the distance of history. To these conditions, let us add the fact that historians deal with events, phenomena, and lives often rather doomed to leave no trace, only to sink into historical oblivion, a precondition for analytical history to which the microhistorian is very perceptive—yet, no one is too poor to leave a legacy, as Blaise Pascal claims.

"Killing a Chinese Mandarin" is a deliberate title for an essay exploring the moral implications of distance. Drawing upon a classic ethical dilemma—one central to both the universal understanding of morality and the ambivalence of distance, as explored by thinkers from Diderot and Chateaubriand to Balzac—Ginzburg clearly illustrates how the growing complexity of bourgeois society and our vast web of interconnected relationships can render us indirect accomplices to murder, thereby testing our will and morality daily (Ginzburg 1998: 203). By invoking the figure of the venerable mandarin, a symbol deeply rooted in a bygone imperial era, the dilemma highlights how vast gulfs of time and geography can detach us from our moral responsibilities—a reality vividly reflected in today's political and diplomatic affairs.⁵⁷ But what about the historians while by manipulating distance and proximity, they alter the emotional resonance of the past—a practice that can bury the traces of vital, existential human experiences for generations?⁵⁸

In this sense, the essay deepens the philosophical context of the microhistorian's moral dilemmas—a critical experience rigorously analyzed in "The Inquisitor as Anthropologist". Distance is a fundamental prerequisite for scientific abstraction. However, when an individual is reduced to a pure abstraction, they become so remote that they easily devolve into a mere statistic or data point—a reductive process from which science itself is not entirely innocent. Consequently, the individual becomes an easy, impersonal target for both symbolic and physical destruction. Prolonged, intense scrutiny brings tears to the observer's eyes—not merely due to physical proximity, but because of the overwhelming weight of emotional intimacy.

⁵⁷ See the interview with Carlo Ginzburg by Philippe Mangeot, conducted on September 11, 2001, titled "De près, de loin. Des rapports de forces en histoire" (Mangeot 71–104), there are no signs of the New York attack yet; this clearly happens hours before that catastrophic event.

⁵⁸ See also Mangeot 2007: 71–104.

A careful interrogation of our personal reactions, assumptions, biases, and emotions toward archival data is therefore a vital precondition for transforming the affective connection between researcher and subject into an innovative paradigm. However, this method demands a particular theoretical mindfulness and the reflex to balance abstraction and affect, as the latter risks the kind of emotional identification between a researcher and their subject that we thematized above. Conversely, maintaining a theoretical and objectifying distance from the subject must not drown out profound silences – a significant sign of the very incommunicability of human experience, which is at the core of the state of bearing witness (Ginzburg 1992a: 529–548).

At the same time, the potential for the return of a stifled and repressed past lies precisely in the ability to let oneself be affected—in refusing to be ashamed of what constricts the throat and clouds the eyes. It is within this shared moment of affectedness between the subject and the researcher that the past becomes present.⁵⁹ Through its remaining traces, a fragmented historical experience of trauma and suffering comes to light, revealing an alternative past—counter the official historiography—of the excluded that encompasses their dreams, desires, and beliefs. This scholarly ethos, anchored in Carlo Ginzburg’s microhistorical practice, exposes the fictional nature of the archive by seamlessly bridging history, philology, and phenomenology. Consequently, the micro-analytical focus shifts toward a profound understanding of both the intersubjectivity of the social and political spheres and the subjective stance toward the world—what is often termed the “past” or the “ownership, mine-ness of experience.”⁶⁰ In turn, this shift resonates powerfully today within the productive and enduring interdisciplinary debate regarding the relationship between rhetoric and truth, history and fiction, the nature of evidence, and the limits of experiment and method.⁶¹ This debate feels especially resonant at a time when the past more insistently lays claim to us.

In summary, the deep tension between objectivity and intimacy requires us to transform the close observation of the researcher’s involvement into an essential protocol within microhistory practice. Carlo Ginzburg’s numerous and exceptionally candid interviews expand the body of such records that lift the veil on the hidden affective reality of both the historical and research realms, while projecting an image of *uncompromisingly rigorous interpretive honesty, self-discovery, and*

⁵⁹ See notes 38 and 41.

⁶⁰ By incorporating lived experience into its research framework and problematizing the relationship between truth and authenticity, the micro-historical research strategy proves highly sensitive to the fragmentation of history—the *histoire en miettes*, as *Quaderni Storici* diagnosed this practice very early on within the Italian context (Grendi 1994: 539)—wherein macro-narratives fracture into myriad individual trajectories of suffering, endurance, and survival; an analytical research endeavor the consequences of which involve introducing the individual into history through existential concepts.

⁶¹ From his perspective, perhaps the experience—stemming from research necessitated by circumstances—led him to discover an ancient rhetoric based on evidence, in contrast to modern and postmodern rhetoric, which opposes evidence. See Ginzburg 1999.

a highly individualized paradigm. As it became an inseparable archive for tracing the history of a collective analytical proposal, microhistory is often viewed as a Jewish paradigm—a Promised Land for the generation of exceptionally talented historians who survived the Holocaust.⁶² This particular corpus of documents, along with the reflective essays on microhistorical assumptions of the founders of breakthrough historiography (Levi 1992; Ginzburg 1994; Grendi 1994), helps us realize the significance of the Copernican revolution as a specifically Italian path. Furthermore, it clarifies how this historiography was *provided with a theory born from the constraints, experiments, and reflections of its own fieldwork, as visibly evidenced by Ginzburg's scholarly trajectory.*

Far from causing history to close in on itself, this approach serves as a critical precondition for opening the discipline to interdisciplinarity. It empowers historical analysis, simultaneously fueling and challenging E. Grendi's position that “namely, that microanalysis represented a sort of Italian path toward a more advanced (theoretically driven) social historiography, within a context relatively frozen by a hierarchical orthodoxy regarding historical significance and by a resistance to the social sciences” (Grendi 1994: 544). Ginzburg's contribution to a more sophisticated history—which opened the historical field to interdisciplinarity and a theoretically better-grounded science—remains widely recognized for at least two reasons: he never turned his back on the macro-context, being very attentive to the historical contextualization of his close-up. By doing so, he challenged both the insularity of history relative to the social sciences and the dominance of a historiographical orthodoxy—one comfortably entrenched in a disciplinary superiority that strictly ranks the importance of its subject matter. This effective and productive critique is occurring within shared microhistorical assumptions of E. Grendi, G. Levi, and S. Cerutti.

Let us remember his motto—a paraphrase of Kant: “Without the etic element, research is blind; without the emic, it is empty”—which he liked to quote in various contexts to uphold the substantial specificity of the microhistory. Such an approach is impeccably bound to blur conventional boundaries, including the fixed lines between the social and cultural dimensions of the microhistorian's craft (as “To Kill a Mandarin” also reconfirms).⁶³

⁶² As Carlo Ginzburg recalls, “I have never received a religious education, but I slowly realized what it meant to be a Jew. Strangely enough, an important step was my first meeting with Giovanni Levi while playing soccer in a park (we were twelve). We started talking and I realized that we belonged to the same milieu—*antifascist, secular Jewish*. Twenty-five years later, Giovanni and I *were both involved in the discussions which paved the way for microhistory*. In a recent interview with a Brazilian historian, Deivy Carneiro, Levi described our first meeting and recalled that the two of us had three things in common at that time: soccer, painting, and Donald Duck drawings by Carl Barx—and now we even joke about whether we should call ourselves ‘Barxists.’ Giovanni Levi and I used to call Barx's drawings ‘genuine Donald Ducks.’” (Dayeh 2022: 202–203). See also Ginzburg 1998: 12; Gundersen 2003; Ginzburg 2012; Levi 1992; Brayard 2010; Guerreiro 2020; Tarantino 2014.

⁶³ See also Ginzburg 2005: 665–683.

In this instance, we are clearly prioritizing *Wooden Eyes*—in part due to a personal intellectual debt to Carlo Ginzburg and his insightful proposal for close-up readings of the role of emotions in history and historiography, which leaves room to build upon the method. The book comprises nine essays on distance that trace a common thread: the attempts by ancient and Enlightenment philosophers, as well as modern writers, to devise tools for a critical understanding of reality to avoid being consumed by it. These tools include Greek reflections on myth and the Jewish prohibition against idolatry. Furthermore, the work examines precise distance alongside its excess, exploring how an absence of empathy can function as both a necessary critical distance and a condition for dehumanization. To restate, these essays have significantly enhanced the contribution of microhistory to the *affective turn* within the historical field and beyond.

In this context, it should be noted that Carlo Ginzburg is highly vigilant and defensive when he perceives a risk of blurring the distinction between science and scientism, especially since his methods are debated regarding their affective stimulus.

I refer to that distant background to explain to myself the unreasonable euphoria I felt when I wrote the first sentences of my first book. It seemed to me that the documents on which I was working (inquisitorial trials) opened a broad range of narrative possibilities. The tendency to experiment in that direction, which also sprang from my family background, found both encouragement and limits in the sources. But I was persuaded (and still am today) that between testimonies, *both narrative and nonnarrative, and the reality to which they bear witness there exists a relationship that needs to be analyzed from time to time*”, as the historian argues in 2012.⁶⁴

This is a kind of manifesto that Carlo Ginzburg professed throughout his life trajectory as both a historian and an active citizen—though never a political activist.

**Conclusion: Standing with the victim of injustice,
always—without turning support into political activism**

For his breakthrough studies and highly influential books, Carlo Ginzburg was honored with several of the most prestigious Italian and international awards for literature and art. In 1998, he received the *Viareggio* Prize for his book *Wooden Eyes: Nine Reflections on Distance*. This renowned literary award was established in 1929 with the involvement of Luigi Pirandello—notably special edition of the prize was uniquely awarded posthumously to the Antonio Gramsci in 1947. Carlo Ginzburg frequently engaged with the philosophy of Benedetto Croce through the critical lens of Antonio Gramsci’s intellectual framework, using their contrasting historical and political

⁶⁴ See Ginzburg 2012: VII–VIII.

perspectives to process and cope with his own family's trauma (Ginzburg 1992: 529–548)—a tragic reality of his father inscribing in a collective historical defeat. A deeply personal motivation for such approach, he confides in one of his most emotional essays: his father, Leone Ginzburg—a renowned antifascist writer, editor and resistance fighter⁶⁵—was arrested and tortured by the Italian police and German authorities, in the end dying in the Regina Coeli prison hospital in 1944. Strikingly, one of the most significant honors and recognitions paid to Leone's enduring legacy as a historian came directly from Benedetto Croce himself (Ginzburg 2007: 46); they were close friends, but their paths start diverging when Croce seems to approve the mandatory Fascist oath required of university professors, whereas Leone Ginzburg refuses to take it despite his friend's pressure, losing his academic job in the early 1930s (Dayeh 2022: 2003). As Ginzburg frames it,

I now understand that the importance I attached to the individual element stemmed from Croce's aesthetics, while the need to transcend that individual element through generalization came from Gramsci. These were the lenses through which, shortly thereafter, I would read Adorno's *Minima Moralia*, Freud's *The Psychopathology of Everyday Life*, Marc Bloch's *The Royal Touch*, the essays of Aby Warburg, and so on (Ginzburg 2007: 46).

Fully aware of the risk of history turning into ideology, Ginzburg resists the temptation to create a pantheon of victims. By remaining faithful to the historical method—which he sees as a space for self-revelation and understanding—he acknowledges that his work maintains an exceptionally strong connection to the dead, most notably expressed in his essay on and review of De Martino, whose writing style left deep imprint on him.⁶⁶ There are the dead who haunt me, to whom I feel bound by a sense of emotional identification, as Ginzburg confesses. For the historian, a Jewish descendant, the dead shape the reality in which we exist, and which encompasses not only the victims but also the executioners, with their complex relationship to the world—a world filled with many dark aspects. Therefore, reconstructing the past means understanding its contradictions, as we follow Carlo Ginzburg's emotions and the logic of his argument. Driven by this, the scholar constantly seeks to complicate the process; for him, research is like a game of chess in which every move determines the next (Mangeot 2007: 72–73).

⁶⁵ Leone Ginzburg edited *L'Italia Libera* under a false identity, was arrested in November 1943 during the German occupation of North and Central Italy, and after his identity was discovered, he was tortured to death. This family trauma left an indelible mark on his Jewish identity and intellectual pursuits—a profound experience he frequently revisited in his speeches and writings, delving into the precise crucible that shaped his identity as a Jew, the fragments of which we endeavor to untangle in this essay.

⁶⁶ See Ginzburg 2013b: 13–20; Ginzburg 1979: 238–242.

Against the backdrop of his marked withdrawal from political activism, this pursuit becomes even more complex, burdened by the contradictions of legacy, familial and collective.

Carlo Ginzburg—as he himself emphasizes—takes a conscious distance from the militant history of anti-fascist Italy to understand a profound defeat: that of his father and the leftist working-class movement.⁶⁷ Following Gramsci's paradigm articulated in his *Prisoner's Notebooks*, Ginzburg's approach to the past recognizes the vital necessity of understanding the reality of defeat from different perspective. Its logic demands confronting factuality on two levels: legal rights and the actual state of affairs. It requires acknowledging that the enemy sometimes triumphs simply because they are better equipped—technically, ideologically, politically and economically. Through this kind of “estrangement”—a scholarly detachment designed to keep reality from consuming him—Ginzburg acquires the intellectual tools necessary to confront the “provincialism of ego” through critical distance rather than empathic identification.⁶⁸

Judging by his interviews—acting as a confession and a place of self-discovery—as well as by the hidden affective reality behind his highly insightful essays, the figure of the father occupies a central place in Carlo Ginzburg's identity. This is clearly evident in moments when the dramatic fate of a persecuted people looms large behind the son's Jewish self-awareness and identification as secular diaspora Jew; Ginzburg links his initial interest in linguistics and his enduring affinity for philology precisely to the broken professional career of his father, Leone Ginzburg. On the other hand, the image of his mother, Natalia Ginzburg—a leftist intellectual, talented writer, and member of the Italian Communist Party—usually appears in the context of childhood memories and the arduous struggle for survival in Fascist Italy. It can only be surmised that his marked estrangement from political activism stems from a desire to emancipate himself from both his father's destiny and his mother's shadow—powerful presence in the country's political and cultural life from the 1950s to the 1970s;⁶⁹

⁶⁷ In this context, a childhood memory recalled by Carlo Ginzburg during his interview with Islam Daymah—when asked about his grandfather's fate as an expelled professor from the University of Turin—is highly significant: “I vividly remember that time, I remember when the English tanks arrived in 1944—we were hiding near Florence. And I also *remember the sense of defeat after the 1948 elections! It was as if the whole family had invested emotionally and politically in the Fronte Popolare* (“Popular Front”), the coalition the Communist party participated in” (Dayeh 2022: 201).

See also Ginzburg 1963.

⁶⁸ See Barbera and Catino 2026: 111–124; Mangeot 2007: 71–104; Brayard 2010.

⁶⁹ Given that Graham Greene's work was subjected to rigorous scrutiny by the Vatican during the 1940s and 1950s—as revealed by G. Murphy—we may surmise that Ginzburg's books, written by both mother and son, were likely the subject of similar surveillance. Of course, the definitive truth remains hidden within the Vatican's unopened archives, by fortune keeping the famous C. Ginzburg letter to John Paul II.

she belongs to the family of a prominent left-wing activist and militant of the anti-fascist Italian resistance.⁷⁰

Despite her limited, father-overshadowed presence, in the interviews and her absence from his field-defining historical works, it is precisely the maternal legacy that revitalizes his paradigm by exposing the fictional nature of the archive and transforming its lacunae into productive opportunities for the historian. As Anthony Pagden emphasizes, Ginzburg left an incredible impression as “a highly sensitive and imaginative historian whose prose style reproduces much of his mother Natalia’s clarity and precision. *He has been able, as few others would have been if presented with the same material, to make his historical characters live*” (Pagden 1984).⁷¹ This first—and nearly last—articulated image of their cultural kinship in a book review,⁷² elegantly and sensually expressed, clearly does not become a source of pleasure. Instead, Ginzburg’s public reaction to Pagden’s critical text suggests that it grows into a source of palpable resentment (Ginzburg 1984). The younger political historian and anthropologist primarily praised Ginzburg’s talent as a writer, while questioning the effectiveness of his historical reconstruction as a learned and promising scholar.⁷³ Yet, this

⁷⁰ See Natalia Ginzburg’s semi-biographical novel *Lessico familiare* (Ginzburg 1963).

⁷¹ Reviewing the English edition of *The Night Battles*, Anthony Pagden offers a sharply critical take that nevertheless captures the heart of the book’s wagers: Ginzburg’s awareness of archival limitations, and the intellectual audacity required to make lower social worlds visible within their own cultural logic, ultimately helping us understand their surroundings. (Pagden 1984). See Pagden, Anthony. “Being a benandante”. – *London Review of Books*, 2, No 2, February 1984. Available at: <https://www.lrb.co.uk/the-paper/v06/n02/anthony-pagden/being-a-benandante> [accessed 20 June 2026].

⁷² It is interesting to note that in almost all the obituaries published in major European and American newspapers, the figure of the father, Leone Ginzburg, dominates that of the mother, Natalia Ginzburg, in their son’s life. In *The Guardian’s* editorial obituary, she is entirely absent. Liz Potter noticed this omission in her reader’s letter to the editor in order to point out the mother’s role; though left a widow, she managed to protect, raise, and educate her children. See <https://www.theguardian.com/books/2026/jun/24/dont-forget-the-role-of-natalia-ginzburg> [accessed 24 June 2024]. Shortly afterward, the Ginzburg’s obituary by John Foot, specialist in contemporary Italian history, appeared in the same newspaper. It underscored her significance by referring precisely to this excerpt from A. Pagden’s review. In evoking this piece, where the critic celebrated the gifted writer—Natalia’s son—he implicitly, and perhaps unconsciously, touched upon the embittered chapters of Carlo Ginzburg’s career as a historian. See note 8.

⁷³ “In his long review on my *The Night Battles* (LBR, 2 February) Anthony Pagden, having first praised me for my literary skills, goes on to criticize vigorously the ‘sometimes shaky nature of the arguments and assumptions which ‘underpin’ my ‘reconstructions’,” writes Ginzburg in the first lines of his answer to Pagden’s book review. – *London Review of Books*. “Letters”, 2, No 7, April 1984. Available at: <https://www.lrb.co.uk/the-paper/v06/n02/anthony-pagden/being-a-benandante> [accessed 20 June 2026]. Pagden’s response to Ginzburg’s letter also is quite telling in this regard: “But first let me dispel any suggestion that my praise of his literary gifts was in some sense intended to devalue his equally considerable historical ones. It is a vulgar error, in which Professor Ginzburg’s Italian enemies have all too often taken refuge, to suppose that ‘good’, substantial history can only be written in a heavy pedestrian style. The historian’s language is as vital to his craft as the philosopher’s, and the social historian whose task is the

review initiates a well-known public exchange of letters between two distinguished professors whose professional paths intersected for a time at UCLA. It frames their dispute regarding the methods, evidence, and argumentation involved in historical reconstruction based on fragmentary archives and scant information about the context of the daily lives of the peasants in question—a sect of werewolves built on the common beliefs and rituals of the man born in a caul and called to protect the harvest and the fishing;⁷⁴ historiographical omissions that, in Pagden's view, make Ginzburg's historical construct unconvincing when addressing this cultural and social anomaly in early modern Northern Italy.

These methodologically critical clashes were soon followed by the famous debate over the assumptions and limits of microhistory between Natalie Zemon Davis and Robert Finlay, which played out intensely and with gendered nuances in the pages of the *American Historical Review*.⁷⁵ Public debates, along with a highly productive dialogue between Carlo Ginzburg and Giovanni Levi concerning their distinct methodological commitments, played a major role in transforming the microanalytical approach into a globally innovative paradigm that transcended Italian borders.⁷⁶ Consequently, those debates accentuated the role of imagination, empathy, intuition, and chance within a rigorous theoretical framework for navigating fragmentary archives.

By constructing both series—of similar, analogous myths and rituals, regardless of their clearly manifested context and distinct form, and of stylistic features revealing the genesis of shared cultural phenomena, verifying limits of indicial paradigm (Ginzburg's hallmark), or reconstructing anomalous phenomena and random events without losing sight of social structures, relational context, and verifiability of social systems (Levi's signature), while increasingly illuminating the deep connections between cinema, literature, art, anthropology, and social history (Davis's intellectual brand), in fact, microhistorians continuously revealing the experimental power of microhistorical analytical proposal to do history in a different way.

reconstruction of forgotten worlds is in greater need of a literary gift than any other.” – Ibid. Almost twenty years later, concerned with discussing the relationship between fiction and history, Ginzburg links this interest to the fact that *he was always tempted to experiment with how fictional technics could serve the purposes of historiography*—of a historical discipline that is anything but dull. In this context, he says: “My mother, Natalia Ginzburg, was a writer. As a boy, I tried writing novels, but I think I would have been a bad writer; actually, I dreamed of becoming a painter, though I didn't. Yet the fascination remained” (Mangeot 2007: 98).

⁷⁴ See also note 27.

⁷⁵ See Finlay, Robert. “The Refashioning of Martin Guerre”. – *The American Historical Review*, 93, No 3, June 1988, 553–571; Davis, Natalie Zemon. “On the Lame”. – *The American Historical Review*, 93, No 3, June 1988, 572–603.

⁷⁶ By laying the foundation of microhistory, this exchange helped both scholars clarify their agreements and contradictions regarding the focus of the historical microscope—a dialogue that has been, to some extent, echoed through subsequent issues of Sociological problems. See *Sociological Problems* 2010; *Sociological Problems. Special Issue* 2011 available at: <https://www.cceol.com/search/journal-detail?id=760>

As a fiercely principled historian renowned for analyzing the silences in Inquisition testimonies and the institutional anxieties behind manipulative judicial practices, Carlo Ginzburg is unafraid to apply this same rigorous evidentiary critique to contemporary political trials, most notably in his exposure of the structural contradictions and factual gaps in the controversial 1988 prosecution of Lotta Continua leader Adriano Sofri. In which case—by his own admission—he did not pursue the truth for the sake of truth itself, but rather to demonstrate publicly the invalidity of the evidence the judge had presented against his friend (Ginzburg 1991).

Based on a close analysis of the trial protocols and the judge's performance, Ginzburg's work is crucial to ensuring that this political trial—concerning the murder of Milanese police chief Luigi Calabresi—is remembered in a highly critical light, as it exposes the mechanisms behind the indictment.⁷⁷ Leaving us his notes in the margins of the documentation of this scandalous process (the so-called Sofri case), the historian standing against the judge gives real meaning to the concept of a vigilant civic conscience. His testament outlines the clear moral boundaries of civic vigilance and reshapes how we view the limits of politics and power—including the judiciary—by addressing the moral and ethical dimensions of citizenship (Ginzburg 1997).

Evidence of how deeply this injustice affected him can be found in the final words of his 1997 preface to *Occhiacci di Legno*, a book in which he analyzes the cultural genealogy of justice and injustice, investigating how affects shape an ontology of the just—both as an analytical category and a lived practice: “As I take leave of these pages, my thoughts turn to Adriano Sofri—a friend both closest and most distant—and to Ovidio Bompressi and Giorgio Pietrostefani, with the hope that their innocence will finally be recognized soon” (Ginzburg 2001: XV).⁷⁸ The historian is associated with the petition demanding that court records be unsealed and made public. Parallels with Inquisition trials emerge—particularly in their atmosphere and setting—as he confronts a stark truth: the modern Italian judge seems less concerned than the inquisitor with ensuring that the indictment rests on legally admissible evidence rather than bare assertion derived from contextual analysis.

⁷⁷ Carlo Ginzburg's book, *The Judge and the Historian*, has been translated into several languages and, alongside the public movement in defense of the accused, helped generate international attention around the case. As he confessed, he involved himself in this movement not only because he was convinced of his friend's innocence, but also because he believed that his own intellectual capital would influence the fairness of the trial (Ginzburg 2007: 42; Mangeot 2007: 85–86). See for example, A. Stille's book review and subsequent notes on the historical inaccuracies linking the trials to the 1969 Milan bank bombing that killed and injured innocent civilians (*New York Times* 2000).

⁷⁸ The preface was written in December 1997, their definitive sentence of 22 years in prison had been handed down earlier that same year by Italy's Court of Cassation. Thanks to the publicity surrounding the proceedings, the case was referred to the European Court, and Ginzburg long hoped that the Italian President would pardon those convicted.

As the historian puts it, his deep involvement in this criminal justice case stems from two reasons, both of which are bound by affect. The book was written between the first and second trials under a twofold pressure: on the one hand, the emotions felt for a close friend subjected to injustice motivated his attitude toward the trial—insofar as Ginzburg could have no doubt that the accusations were unfounded; on the other hand, he was concerned by A. Sofri's refusal to rely on the presumption of innocence in Italian law (a stance also emotional at its core). Sofri's friends, including Ginzburg, believed his uncompromising stance reflected his distinct character and a deep sense of dignity rooted in his innocence (Ginzburg 1997: 7–16).⁷⁹ In this regard, the book at times seems to substitute for a right the accused chose not to exercise—the presumption of innocence until proven guilty.

Grounded on documents rather than his imagination—as he proceeded in the case of the Inquisition trials—the historian, acting as a judge, attempts to resolve the current trial case by approbating and validating his method (entangled with close-up observation and clue-based interpretations) for navigating controversial archives and their disputable documents. He remains ever attentive to proof, argumentation, and the relationship between rhetoric and truth, while revealing both the intersection of rhetoric with medicine and the structural closeness of history to law. Each of these segments reflects the heuristic power of his evidential paradigm, emphasizing the relationship between image, text, and representation by exposing the distinct boundaries between fact, falsehood, and fiction. In doing so, the historian—stepping into the role of the judge—consistently illustrates the essence of the judicial process through the lens of asymmetry and the power dynamics between the adjudicator and the accused. Carlo Ginzburg's characteristic attentiveness to specific factuality is evident here as well, as he addresses an epistemic challenge to both historical and legal proof: the tendency of a suspicious mind to transform ordinary evidence into proof of a conspiracy, resisting the idea that things can simply be what they appear to be.

Ten years after his book was published, on September 11, 2001, Carlo Ginzburg spoke with Philippe Mangeot—the well-known French literature teacher, social activist, and screenwriter (Mangeot 1997: 71–104). In this interview, which took place just before news of the New York terrorist attacks shook the world, they discussed the inherent asymmetries that shape judicial processes. They also explored the role of emotions in history and historiography, as well as the resilience required to face the loss of certain illusions while preserving those that remain intact. Throughout their conversation, they addressed the delicate balance of distance and closeness in both politics and research, frequently touching upon the prominent figure of Adriano Sofri. Driven by the emotional weight of the discussion, Ginzburg shared a deeply intimate, almost confessional revelation about his own character.

⁷⁹ See also the postface to French edition of this book (Ginzburg 1997: 169–187).

In 1994, Amnesty International asked me to give a talk. The fact is, *I am not an activist—I never have been; there is something in me that resists any form of activism*. In 1994, Amnesty International asked me to give a lecture. The fact is, I am not an activist—I never have been; *there is something in me that resists all forms of activism*. It is, incidentally, a trait of mine that I really dislike. Around that same time, my friend Adriano Sofri had traveled to Sarajevo several times, right in the midst of his own legal ordeal. I, on the other hand, had done nothing, and I must admit I felt a nagging sense of guilt. I recalled the story of the Chinese mandarin; [...] *moral obligations weaken with distance*.

So, I began to reflect on the history and variations of this “Chinese mandarin” motif: how does distance affect our emotions, our compassion, and our commitments? Yet, can distance also be a matter of time? What compassion do we feel for those separated from us by a vast span of time? (Mangeot 2007: 92–93).

This appears to be the genesis of his insightful essay, “Killing a Chinese Mandarin”, which offers highly unpleasant answers to these questions. However, as Ginzburg argues, thinking inherently means reflecting on unpleasant things. In this same context, he returns to a persistent frustration: though he had never managed to study the Inquisitors with any real enthusiasm, but he is trying.⁸⁰ What stands firmly behind his commitment to history—as this interview reveals and deepens—is his conviction that delving into the core of historical anomalies within the *longue durée* does not sever our bridge to the past or prevent us from identifying as its heirs. On the contrary, Carlo Ginzburg seeks to reveal a deeply held belief: an existing historical lineage linking the persecution of lepers, Jews, and witches, despite it being poorly documented. In his research, he demonstrates how medieval fears of conspiracy evolved and merged over the centuries. By tracing these connections, the author proves that early modern witch trials were not isolated phenomena, but rather the culmination of a deeply engrained culture of exclusion and the systematic scapegoating of marginalized groups. It is no coincidence that, in his later books and interviews, he increasingly draws parallels between the practices of the Inquisition and those found in modern Italy—whether under Mussolini’s fascist regime or within the judicial system of the democratic Italian state. While he recognizes the tragic fate of his father in the figure of Menocchio, he sees the same sophisticated methods used by inquisitors to extract testimony and manipulate proceedings in the actions of the judge presiding over the trial of his friend, Adriano Sofri (Ginzburg 1991).

Consequently, Carlo Ginzburg left a significant legacy by critically penetrating layers of deeply ingrained historical prejudices, obsessions, and fears—forces that continue to drive everyday choices at both the micro and macro levels,

⁸⁰ See Mangeot 2007: 73. The exact expression the historian uses in French is “avec un véritable transport,” which in French can have also a connotation of transference in Freudian sense. – Ibid.

thereby threatening the future of civilization. Given its tireless deconstruction and critical analysis of fundamental historical biases and fixations, Ginzburg's work establishes itself as a bold stance against naive positivism and supposedly sophisticated neo-skepticism—precisely as his admirers, supporters, and followers maintain.

Over twenty years later, we must acknowledge the critical perspective of Eduardo Grendi, one of the architects of microhistory's analytical framework. He argues that Ginzburg's choices highlight two distinct micro-analytical approaches: one "social" and the other "cultural" (Grendi 1994: 440). While Grendi noted that the dividing line between them was already blurred at the time, it remains even more elusive today—largely due to Ginzburg's tireless efforts to dismantle this dichotomy by transgressing the concept of morphology as ahistorical and utilizing philology as a technique with political purposes.

The analytical lens of Ginzburg's *occhiacci* (fierce eyes) invites us to re-examine the shattered world of the accused and the anonymous individual, refocusing scholarly interest on arbitrary moments of everyday life through which global processes and deep social structures can be inductively viewed, and prioritizing specific micro-observations as a starting point over the abstract categories. In pursuit of historical truth in the sense as defined by Carlo Ginzburg's methodology, contemporary advanced studies remain acutely attentive to the fluid boundaries, structural distances, and conceptual distinctions between history and fiction. Similarly, they deal with the complex interplay between history and memory, a dynamic that has transformed the archive into an active site for negotiating cultural identities and political tensions. Consequently, modern historiography has largely abandoned grand narratives and traditional, event-driven paradigms, choosing instead to build upon Ginzburg's methodological legacy by shifting focus to the event as an object of microanalysis.

This rigorous, close-up approach expands our empirical horizon, enabling us to interrogate archival shadowed silences and illuminate history's obscured terrains. Such a methodology guarantees an empirical integrity that—in stark contrast to the controversies surrounding David Albahari's historical skepticism⁸¹—ensures we never regret entering the archival field of history, a practice masterfully demonstrated by Carlo Ginzburg.

In mid-1990s E. Grendi asserts, "It is paradoxical that microhistorians, despite lacking a unified global project and theoretical foundations, experienced an institutional rise that made them look like 'a mafia'" (Grendi 1994: 439). However, this assertion is simultaneously validated and defied by Carlo Ginzburg's foundational texts and debates. Alongside a growing body of theoretical and empirical studies, Ginzburg's works demonstrates that microhistory can indeed be viewed as a distinct intellectual movement bound by a clear methodology (Ginzburg 2015).

⁸¹ See Albahari 2005.

P.S.

While broad academic circles, intellectuals, official institutions, and influential media deeply mourned Ginzburg, the silence of Italy's highest political figures stood in stark contrast. Prime Minister Giorgia Meloni offered no comment. Meanwhile, Sergio Mattarella—the President of the Republic, who commands universal respect in his country, even from the Left—reportedly issued a statement; significantly, this communication remains absent from the official Quirinale website, diverging from his standard public protocol.

Giorgia Meloni has clearly not forgotten that Carlo Ginzburg signed the open petition addressed to the Italian Publishers Association (AIE) in early December 2025, just before the launch of the major cultural event. This petition protested the inclusion of *Passaggio al Bosco*—a fascist publishing house—in the Rome book fair for small and medium-sized publishers, specifically objecting to its catalog that features books dedicated to figures with notorious fascist and antisemitic pasts.⁸² The clash later, in June 2026, escalated into a contentious political and cultural scandal, when the AIE made the signing of an “anti-fascist declaration” a condition for participation in future editions of the Rome book fair—*Più libri più liberi* (“More Books, More Freedom”). G. Meloni strongly opposed this move, describing the requirement as an act of pure censorship incompatible with a democratic society (Meloni 2026).

On June 23, 2026, during the Panthéon induction ceremony honoring historian Marc Bloch and his wife, Simonne Vidal, French President Emmanuel Macron paid tribute to Carlo Ginzburg in his address. While celebrating

⁸² The Italian intellectuals' petition exposes *Passaggio al Bosco's* systematic publishing strategy to rehabilitate the standing of fascist and antisemitic leaders—such as Leon Degrelle and Corneliu Codreanu, the founder of the Romanian Iron Guard, both linked within the international fascist network—by framing their ideas as essential for shaping a militant elite and portraying them as exemplars of supreme courage, discipline, duty, and altruism. — <https://www.ilfattoquotidiano.it/2025/12/02/fuori-da-piu-libri-piu-liberi-lo-stand-delleditore-che-esalta-figure-nazifasciste-e-antisemite-da-barbero-a-zero-calcare-in-80-firmano-lappello/8214910/> [Accessed 25 June 2026].

In autumn 2025, the editors of our journal rejected a highly sophisticated research paper that was fascinatingly grounded in theory. Examining the cyclical trajectory of Pavel Grimalschi—a controversial member of the Iron Guard—between victimhood and state prosecution, this analytical case study theorizes the extreme malleability of human agency under systemic pressure [Pavel Grimalschi (1914–1960): Bureaucratic Violence, Trauma, and the Ethics of Survival]. Through abstract categories and the objectification of facticity, the author reduces a contradictory biography—that of a killer who feels both pleasure and apathy toward violence—into a mere testament to the profound, supra-historical mechanisms by which bureaucracy and power transform violence into an instrument of order. By reframing personal complicity in violence as bureaucratic coercion, the work elegantly utilizes transitional justice frameworks to promote reconciliation and forgiveness, thereby restoring dignity to the perpetrator as a nuanced figure of victimization. In this case, a long-standing training in close-up analysis and a sensitivity to collecting referential points through micro-observations to disclose unknown faces of macro processes likely proved helpful, preventing the editors from losing sight of the pitfalls of relativism in our amnesic time regarding the horrors of 20th century, especially concerned with cases of individual choice operating within such a sharp asymmetry of power.

Bloch as an enduring testament to knowledge and scholarship—and the first historian to enter the Panthéon—Macron highlighted his intellectual kinship with Ginzburg. To bridge the legacies of the *Annales* school co-founder and the Italian co-founding father of microhistory, the President elegantly drew upon the very organic metaphors that Ginzburg famously championed.

His [Marc Bloch's] library was scattered by the Nazis, yet the seeds of his European genius truly took root and gave rise to other scholars—like him, deeply committed to our civilization of freedom—right up to Carlo Ginzburg, who passed away just a few days ago (Macron 2026).⁸³

“I believe that we can attribute to Carlo Ginzburg, without any risk of flattery, what Lucien Febvre acknowledged in Marc Bloch, namely that his works “seem to make one more intelligent as one reads them; they clarify a great many things and stir endless curiosity,” as Giovanni Tarantino contends (Tarantino 2014).

We claim the same thing.



Carlo Ginzburg was fascinated by the style of book designer Jana Levieva, who created the cover for the 2016 Bulgarian edition of *Occhiacci di legno*.

⁸³ Ginzburg's decision to turn to history was not sudden; by his own account, Bloch's legacy was of decisive importance. "However, Tolstoy's book was essential to my approach to history. In between I had the idea of working on literature, but then I read Marc Bloch. From the very beginning, every year, every student of the Scuola Normale was supposed to do some research and discuss it. The medievalist Arsenio Frugoni suggested that I work on the journal *Annales*, which Marc Bloch and Lucien Febvre had founded in 1929. At the time, I was completely unaware of the existence of the *Annales* but once I started working on the journal's first ten years, I fell in love with Marc Bloch's work. After reading his book *The Royal Touch*, which was a turning point, I decided to become a historian," as Carlo Ginzburg puts it (Dayeh 2022: 200).

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Protecting the Tombs and Seeking Justice through Curse Formulas in Lydia and Phrygia

Abstract: In the regions of western Asia Minor, Greek and Hellenized populations of these regions employed various means to protect the funerary space from potential desecrators. Among the measures they undertook for protection were the consecration of the tomb or the complex to one or many deities, and providing different forms of addressing the gods through more or less standardized formulas that warned the culprits regarding the eventual divine punishment. Eumeneian and Laodicean formulas are particularly interesting as they were used by pagans, Jews and Christians alike in the same areas. The article seeks to provide methodological tools to make further distinctions related to their identification. The aspect of intentionality is what makes the distinction between Jewish, pagan, and Christian inscriptions using the same type of formula, as explained at the end of the article.

Keywords: *funerary imprecations, grave protection, Jews, Christians, Eumeneian formula*

Desacralization and Protection of Funerary Environment in Western Anatolia

The area of Lydia and Phrygia is known in the field of epigraphy as one of the most productive and complex in terms of evidence for the intention to protect graves by means of curse formulas¹. This is because in the indigenous pagan environment of the region there was a firm belief that the deceased continued to carry on their existence after death within the burial complex, and any potential desecration made the deceased no longer enjoy the peace of the grave, and join the remorseless wandering spirits whose disturbance and wrath could affect the livelihood and very existence of the living (Cormack 2004: 125; Strubbe 1991: 40–41; Le Bris 2001: 147). We should also keep in mind that these imprecations would always have a preventive character, in case someone tried to desecrate the funerary space. They thus differ from the prayers invoking divine justice (or judicial prayers), where the act of beseeching the divinity took place following the death of a person who was the victim of violence or an unfortunate action

¹ The author would like to warmly thank Robin P. Symonds for suggestions and improvements to the English text.

caused by a perpetrator or a nefarious incident (Versnel 2009: 22; Versnel 2002: 48–51; Doherty 2024: 9–10).

At certain time intervals, libations and offerings were made at the final resting places of the deceased, which could be individual or family tombs. The names used for burial space in the Greek world were *taphos* (for simple tombs), *tymbos* or *choma* (earth mound tombs), *mnema* (those with memorials) and *sema* (burial places indicated by a simple marking) (Bernard 1991: 134). However, in the Phrygian area, the term *heroon* (MAMA XI, 36; Huttner 2019: 155–156; McKechnie 2019: 212; also Johnson 1995: 107, no. 3.15) is very often used for burial space, as well as *koimeterion* (Parker 2023: 128; Mitchell 2023: 106; McKechnie 2019: 222), this latter term used particularly by Christians in the 2nd–3rd centuries AD.

In some cases, the funerary space could take on the appearance of a veritable complex where, alongside the stela or the *bomos*, not only fencing and elements of boundary demarcation could be present, but also images of the deceased, statues or other types of representations, along with trees or even consecrated groves, in the case of very wealthy people. Statues or representations of apotropaic animals protected the eternal peace of the deceased, some of these animals like lions being even mentioned in the funerary epigrams (SGO I, 01/06/01; Le Bris 2001: 147–148). The owners could either donate money to a specific association, to local authorities or a temple to perpetuate their memory during celebrations, or even parcels of vines or olive trees to ensure the annual income needed for such purposes. Such practices related to funerary complexes were present not only in this region, but also in other parts of Asia Minor (Bernard 1991: 367, for the monument of Titus Praxias in Akmonia; CIMRM, I, 22 = TMMM, II, 4; IGSK, 54.1, 77; IGSK, 54.1, 66).

The burial site could therefore be clearly marked as such and consecrated to a deity (IGSK 52, 8 and 113). It may have been fenced and marked with apotropaic objects such as the sceptres representing the power of the gods (*he dynamis tou theou*), during special ceremonies in which curses were pronounced on potential wrongdoers, as indicated by two similarly-shaped stelae found at Yassieynehan in eastern Lydia, not far from ancient Saittai. The first one reads:

On the ninth day of the last decade of the month Peritios, in the year 176 (=29 Peritios 91/92 AD). Grandmother Iole, daughter of Hermophilos commemorated Tatia, his own daughter. Let no one harm the tomb. Iole, daughter of Hermophilos uttered curses while raising the (sacred) sceptres all around this tomb' (Şahin, Onur 2008: 128–130, no. 1).

The second inscription was raised almost two decades later and mentions the same contemporary procedure of uttering preventive curses while marking the tomb with sceptres as effective symbols of power:

On the seventh day of the last decade of the month Apellaios, in the year 193 (=27 Apellaios 108/109 AD). Ammia, the daughter of Kallisthenes, was commemorated by her son Apollonios and her husband and other children and son-in-law. If anyone should sin against the tomb, sceptres were erected around the tomb' (Şahin, Onur 2008: 130–131, no. 2).

Other ceremonies of raising the sceptres pre-emptively as agents of vengeance occur not only in a funerary context, but within confession inscriptions found in Phrygia (Thonemann 2022: 285–287). The culprit was thus considered to have violated civil and divine laws (Chaniotis 2004: 29) as an impious, sinful and sacrilegious person liable to suffer the wrath of gods, being cursed or finding the deity unmerciful (IGSK 52, 57). In a single situation (according to Helms 2012: 158) there seems to exist a juridical context related to a potential lawsuit against the violator of the tomb, and not divine justice. The most common of such formulations was that he “shall be declared an impious (person) and shall be cursed and (treated) as a grave robber (*tymbōrychos*)” (IGSK 52, 91–117. (For *tymborychia* related to a Hypsistarian Godfearer, Aurelia Domna, in northern Phrygia, see Mitchell 2023: 289–290).

Power of Words. Curses and Benedictions

The name and memory of the deceased had thus to be forever perpetuated for the peace of the deceased, the surviving family and the community. The fact that these imprecations appear in such large numbers in funerary inscriptions may also be an indication of the frequency of these practices of desacralizing the funerary space, whether due to the financial inability of members of certain poor families to secure a burial place or because of the malicious intentions of some who were tempted by the valuable belongings of the deceased (Moga 2019: 170–171). These acts immediately caused the wrath of the deity under whose patronage the tombs were placed, punishments that could be inflicted not only on the offender but also on his descendants' descendants (*heis tekna teknon*), as we could see from an example from Kalın Harman, in the area of Tabala, dated to AD 261/2:

In the year 346, on the tenth day of the month Daisios, the high (?). They honored his (their) father, Stratoneikianos, his sons, Glykon and Stratoneikianos, and his wife, Menophila, to his good memory; if any one desecrate this tomb, let him suffer the wrath of Apollo and Mistress Anaëitis upon the children of their children and the descendants of their descendants' (IGSK 52, 66 = Trebilco 1995: 73).

Here, as in many other instances of non-specific cases, according to Strubbe's categorization, there was no possibility left for the culprits to atone for their deed in any manner.

But the power of the curse was two-sided. Firstly, because the protective and defensive function could easily turn into an offensive one through the power of the words contained within the curse, which could be materialized through the direct intervention of the god(s) or goddess(es) to whom the sepulchral area was consecrated. The culprits of the desecration should eventually face the wrath of god for the rest of their lives in constant agony and pain, lose everything held dear, mostly the sight, love and support of the family and even the taste for life (Le Bris 2001: 149–150). Sudden and painful death of the perpetrator (IGSK 52, 36; 46; 77; 83) or total extinction of the culprit's family lineage is also a constant wish on behalf of the deceased (IGSK 52, 37; 39; 47; 86 and SGO I, 04/09/02). The punishment was intended to affect not only the members of his family, but entire future generations (IGSK 52, 89; 121; 127; 148), hence the formula *heis tekna teknon*, i.e. the vengeance should prevail over generations of generations of his successors (Strubbe 1994: 73–83; Horst 2014: 74–76; IGSK 52, 226; 239; 247; 248; 250). This formula is equally encountered in the pagan, Jewish and Christian environments of Phrygia, Lydia, Pisidia and Caria.

Secondly, the curse was double, because there is a strong connection between curse and benediction in the funerary context. Very rare are the situations when the inscriptions containing funerary imprecations do not mention blessings in the same funerary context, either in a Jewish (Johnson 1995: 33, no. 1.22. Strubbe 1994: 85) or a pagan context, for the ones who treat with respect the grave and tomb complex area. A curse addressed to the desecrators is followed in Pissia of Phrygia by a benediction addressed to the ones who preserve the funerary place and observe the prescriptions of the epitaph, stressing that the good deeds would be given back in double. In Neokaisareia, blessings are bestowed upon members of the community or the passers-by who observe the prescriptions and wishes of the deceased: “And much good will come for him, for himself and for his fatherland and for his house and for his remembrance and for his posterity” (Strubbe 1991: 42; IGSK 52, 155).

The power of the curse was supplemented by other deterrents, including heavy fines to be paid either to the local authorities, to the imperial treasury or to local temples. Anatolian Jews also adopted this practice, as we see for example in Nikomedeia that the potential desecrator is menaced with a fine to be paid to the local synagogue (Strubbe 1994: 73). The fines could vary between 1,000 and 2,500 denarii, but could reach up to 6,000. Even the denunciations were encouraged with financial rewards (Moga 2014: 23–24; IGSK 52, 101).

Local Magical Practices Associated

There are also situations known in the relevant literature in which parts of the deceased's body could be used for magical practices. Apuleius mentions such practices in his *Metamorphoses*, as does the text of Petronius' *Satyricon*

in the passage referring to the Ephesian matron who guarded every night the tomb sheltering her husband's body (Petronius, *Satyricon*, 111). Another example is the inscription discovered in north-west Lydia at Tosuntepe Mekvii, in the territory of the present Rahmiye village between Thyateira and Neokaisareia, discovered in 1993 and dated to the Roman Imperial period. The part of the text that refers to potential magic rituals reads:

... if anyone does anything unlawfully for the alienation of anything inside it or around it (the memorial), wrongfully cuts down, moves away, breaks in pieces, mutilates or destroys anything, breaks off any part of the statue or sarcophagus, gives them to the fire, desecrates them, or makes any sacrifice to avert evil in the name of any invincible spell or bind them by oath upon the face of the earth, makes a libation for the removal of any sickness or pain, lifts up whoever lies here or moves him to another place, despoils him, or throws him out, or puts in the body of a stranger...

The inscription features a variant of the triple repetition formula, but in a more elaborate form. Another inscription from Aphrodisias of Caria, dated after 212, contains an almost identical disposition of the expressions, at least in the part that refers to the curse itself: "may the earth bring him no fruit, may the sea be unfavorable to his sailing, and may the seed of his children perish and never be born again". Of particular interest are the comments of the editors Hasan Malay and Marijana Riel on the final part of the inscription, lines 13–24: "The curse is a curious mixture of elements belonging to the sphere of paganism, Christianity and Judaism, and testifying to an environment where different cultures and traditions mixed and borrowed from each other freely. Notable is moreover the complete absence of threats of lawsuit for grave robbery and fines payable to the state authorities" (Malay, Riel 2007: 120).

These remarks of the two editors are very pertinent from several points of view. First of all because in this case, as in other Greek inscriptions from the Lydian and Phrygian area, we find formulas, expressions and concepts that could have been used by pagans as well as by Jews or Christians in the area. When the Jews and Christians of the region use funerary imprecations, they also adopt the typology that we usually find in pagan inscriptions. Secondly, the inscription in question is atypical for most imprecatory inscriptions written in Greek, as they sometimes have a certain structure, with the final part mentioning the payment of fines to authorities, or temples, and even the denouncers of such abuses were financially motivated. Last but not least, what we also note here is the fact that the perpetrator was not given any possibility of atonement for the sin committed².

² For the typology of information and structure see Moga 2019: 169.

Neo-Phrygian Curses and the Eumeneian Formula

The latter observation becomes all the more useful if we compare the texts written entirely in Greek with those contained in the *corpus* of Phrygian inscriptions published in 2020 by Bartomeu Obrador-Cursach. The Neo-Phrygian inscriptions from the Roman Imperial period, written entirely in Greek characters, have been discovered predominantly in the northern and eastern areas of Phrygia and are mostly bilingual. With some minor exceptions, the first part of the inscriptions is written in Greek and the second in Neo-Phrygian. Analyzing the variations in the curse formulas expressed in Neo-Phrygian, Maria Paz de Hoz concludes in a study published in 2022 that Phrygian was still commonly spoken in this more conservative and predominantly rural area of Phrygia (De Hoz 2022: 83). Obrador-Cursach, on the other hand, points out that this practice of preventive cursing comes from the Luwian environment. Most Neo-Phrygian curse formulas do not leave any possibility for the guilty to atone for his mistake. He was to be cursed by Ti- (Zeus), Bat (or Bas) or Dionysos or to be damned “in the eyes of gods and men” (Obrador-Cursach 2018: 444, no. 20.1; 449, no. 24.1. Also Anfosso 2022: 52–54). In only one case is the payment of a fine of 370 drachmas mentioned, in a third-century inscription discovered in İcikli (Obrador-Cursach 2018: 451–452, no. 27.1). On the text of an altar also dating from the 3rd century, discovered at Nakoleia (now hosted in the courtyard of the Eskişehir Museum), we find that a certain priest Brogimaros, son of Epikrates, consecrates the tomb for himself and his wife Kyria by raising a prayer to Brogimaros’ Zeus. This is followed by a prohibition in Phrygian to his parents, in which he curses in the name of Zeus the one who “destroys this place”, then two lines in Greek stating that “praying for this purpose with sacred incantations” he joined his tribe and descendants, presumably deceased before him (Obrador-Cursach 2018: 425–426, no. 2.2). Finally, a last inscription of interest for our analysis is the one discovered in Bağlıca, originally embedded in the wall of a building and now in the Konya Museum, which can be translated as follows: “[Greek] Aur(elios) Menophilos, son of Venustos, and Mania, daughter of Antiochos, his wife, to Appe and Venavia, their children who died before their time, for a memorial. [Phrygian] Whoever does any harm to this tomb of Venavia, who died before her time, let him be left to the will and account of the heavenly king Dionysus. [Greek] And for Aur(elios) Sozon, son of Kankaros, husband of Venavia” (Obrador-Cursach 2018: 428–429, no. 6.1). What is noteworthy here is the use of this variant of the Eumeneian formula in the pagan Neo-Phrygian context.

Another inscription where the Eumeneian formula occurs in the pagan environment is that of Kabalida in northern Lycia, where the desecrator had to reckon before Helios and Selene (Trebilco 2002: 73; Robert, *Hellenica*, XI–XII, 399, n. 4). With certain variations, the expression is also found on some sarcophagi at Termessos, but it is not the divinity, but the deceased, who will pass judgment on the offender here:

Aurelios Chrysogonos, the son of Hermaios, (bought this) sarcophagus for himself and for his wife, Aurelia Protogenia, and for Aurelia Artemis, his sister, already buried. No one is allowed to bury anybody (here). For this, the culprit shall pay Zeus Solymos 2000 denarii and shall reckon before the deceased (TAM, III.1, 813; Johnson 1995: 27, no. 1.16).

Pagan, Jewish, and Christian Employment of the Eumeneian Formula

As early as the publication in the late 19th century of the two volumes of *Cities and Bishoprics of Phrygia*, the British scholar William Mitchell Ramsay considered the funerary stelae containing the Eumeneian formula to be of a Christian nature, although he did not exclude the possibility that some of them may have had a Jewish content. This is because some of the epigraphs bear the names of bishops such as Aberkios of Hierapolis or Metrodorus, or occasionally a chrismon or even the sign of the cross (Doherty 2024: 2–5). One of the Christian inscriptions even mentions the judgment before Christ (Destephen 2022: 168–169, no. 5). William Calder (Calder 1955: 26–27), as Elsa Gibson later (Gibson 1978: 125–135; Peterson Gibson 1975: 154–155), believed that some of the epigraphs belong to the Montanists, particularly those who, in addition to the Eumeneian formula, also use the formula “Christians for Christians”. Louis Robert and later Paul Trebilco assessed that the likelihood that some of the inscriptions displaying this formula are indeed Jewish is high. However, Paul McKechnie, who in his 2019 volume *Christianizing Asia Minor* examines in particular the datable inscriptions containing the phrase in question, but also Stephen Mitchell in his 2023 volume *The Christians of Phrygia*, believes that this formula is *distinctively Christian* (Doherty 2024: 7; McKechnie 2019: 211–213). However, in our opinion these details should not be over-generalized.

The area where this group of a few dozen inscriptions has emerged is the upper Meander basin of southwest Phrygia (including Eumeneia, Akmonia and Apameia), which extends to the area of the Phrygian Pentapolis, the upper Tembris valley and eastern Phrygia. It is a contiguous area near the borders of Mysia, Caria and Pisidia. The name of the formula comes from Eumeneia, a city founded in the Hellenistic period in the 2nd century BC by Attalos II in honour of his brother Eumenes (Mitchell 2023: 110–115). The chronological range is somewhere between the middle of the 3rd century and the beginning of the 4th century at the latest. Exactly datable inscriptions range between AD 246 and 282 (McKechnie 2019: 218).

The standard version of this formula is: “he will reckon (before) God”, but numerous variants are known such as “he will stand before God”, “he will reckon before him who judges every soul”, before the name of God, before the living God, “he will give account at the judgment of God”, “he will be made answerable before God” and so on (Parker 2023: 123–124). Although at least two instances are known in which the standard version of the Eumeneian formula is used in Jewish epigraphs, the Jews preferred a variant similar in form and mean-

ing, called by Johann Strubbe the *Laodicean formula*, “will answer to judgment before God” (Strubbe 1994: 83–84 and 99).

What is important to emphasize here is the fact that certain funerary customs such as the practice of inscribing funeral imprecations according to local tradition, the typology of the formula and the placing of the funerary space under the protection of the divinity are transmitted and adapted in this region of western Asia Minor according to the needs of each religious group. Some formulas such as the Eumeneian, the Laodicean (Mitchell 2023: 106–112), or the triple formula, or the curse upon the descendants of descendants, or ‘by god, do not harm’ came to be used not only by pagans, but also by Jews, Christians or Hypsistarians (Mitchell 2023: 150–155). The fact is perfectly explainable in a very diverse ethnocultural and religious environment such as the fringes of Mysia, eastern Lydia and Caria, northern Pisidia and Phrygia, where the interchange and mixing of populations is very intense in the Hellenistic and Roman Imperial period. Besides, Jews, Christians and pagans were buried without distinction in the same community graveyards.

Yet, what makes the difference is the idea of perspective. Jews and Christians favoured the non-specific model, i.e. they did not prefer to state specific curses in their funerary inscriptions, unlike the pagans. Therefore, we will not encounter elaborate curses at the end of the inscription like that edited by Malay and Riel, with peculiar wishes addressed to the culprit and their descendants:

may the earth bear him no fruit, may the sea be impassable, may he have no marriage nor birth of children, now and in the future, and may he not profit if he adopts any; may he be granted no mercy from gods or daemons nor from men or from his own body, if he is needy may no one give him freely, may he find no helper if he is in trouble, when he is walking may the road close itself to him, when he is engaged in business, may it not flourish, may he be denied fire and water, may everything considered beautiful among men be taken from him; when he dies may the earth not receive him; may he utterly destroyed together with his own kin and may not even stone on stone remain for him; may all of his kin, from the forefathers to descendants of descendants, be utterly destroyed by gods and daemons, and may he, raging mad and eating his own (raw) flesh, confess whatever sin he commits, and if there is something else fitting for curse which is not listed (here), may that befall him as well! (Malay, Riel 2007: 118–119).

On the other hand some of the Christians could have had a Jewish origin, such as, for example, Roubes, ‘*the servant of the great God Christ*’ (McKechnie 2019: 226).

But in Jewish funerary inscriptions when curses do appear, they make reference to those contained in Deuteronomy and the laws of the Jews. And the God is always angry on the perpetrators of desecration, like the gods of the

pagans. It is the same kind of perspective, essentially leaving no possibility for the culprits to atone (Trebilco 1991: 58–77). On the contrary, Christian inscriptions containing Eumeneian or Laodicean formulas or ‘by god, do not harm’ are non-specific, due to the neo-testamentary interdictions to curse on the graves. The vetero-testamentary law or the laws of the Jews (Mitchell 2023: 121) are never mentioned, as the Christians have a new commandment, that of love for the enemies, even when they happen to be desecrators of the graves. The only formulas used for the protection of the grave is actually a warning that the culprits would reckon the judgement of God, as justice is His attribute. Christians should not condemn the perpetrators beforehand, but leave the culprits in the hands of God. Thus it depends on God whether He gives to the wrongdoers any possibility, or not, for atonement.

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Surviving the War of 894–896: Responses in Two Old Bulgarian Hagiographical Texts

Abstract: A substantial proportion of the medieval accounts regarding Bulgarian-Byzantine relations during the early medieval period comprises numerous records of mutual enmity, confrontation, warfare and battles. Most of these primary sources have already been introduced to the academic milieu and analyzed in depth by modern scholars. Nevertheless, ongoing scholarly efforts and the variety of recent contributions clearly demonstrate that there is room for new research and achievements. These include interdisciplinary studies concerning the portrayal of supernatural intervention and the role of warrior saints. The strong and persistent interest in the veneration of warrior saints and the religious practices associated with them in both Byzantium and its Balkan Orthodox neighbors is beyond doubts. This interest is of twofold significance – it advances the development of Byzantine studies, and provides a good example and solid ground for tracing the spread of this type of veneration and saintly cults in Bulgaria after the Conversion in 864.

Keywords: *Hagiography; re-writing, warrior saints, battlefield emotions, transcendental protection*

Introduction

During the turbulent early medieval epoch, the Balkan Peninsula faced frequent raids, and a number of barbaric incursions. After the late seventh century, it was also the scene of deadly conflicts between the so-called First Bulgarian State and the Byzantine Empire. The geopolitical significance of the latter confrontation is paramount. A few early medieval military clashes and struggles for political domination matched the Bulgarian-Byzantine rivalry in terms of its scope, scale or duration. Given this, it is hardly surprising that much of present-day knowledge about Bulgarian-Byzantine relations during this tumultuous, conflict-ridden period comes from primary sources that describe skirmishes, havoc of wars, battlefield triumphs, and the harsh fates of the defeated. Most of these reports are already in circulation among scholars and have been thoroughly analyzed by modern researchers. Nevertheless, they still contain features that invite further interest and offer promising avenues for continued academic scrutiny. The latter encompasses also the respectful multitude of hagiographical texts concerning supernatural intervention and miraculous protection attributed to warrior saints, which, in general, are among the key sources of information and have a special and well-acknowledged niche.

The present study addresses a specific group of aspects, limited in scope and scale, seeking to identify the intersections between military realities and the notions of supernatural protection provided by saints. This is pursued by focusing on two specific cases found in two intriguing Old Bulgarian hagiographical stories—the *Miracle of Saint George with the Bulgarian Warrior* (also known as the *Miracle with the Cross [and the Bulgarian]*, hereafter referred to as the *Miracle with George*), and the *Miracle with Clement Who Was Saved by Saint George in War* (hereafter referred to as the *Miracle with Clement*). These texts are the two most voluminous parts of a tenth-century hagiographical work, known as the *Tale of the Iron Cross* (also known as the *Tale of Christodoulos the Monk*, hereafter referred to as the *Tale*)—a collection of ten literary works describing miracles of Saint George, which skillfully integrates translated and rewritten fragments rooted in the Byzantine tradition alongside original Old Bulgarian stories, in the framework of an introduction and epilogue (Angelov 1971: 121–155; Turilov 1996: 81–99; Turilov 2000: 412–427; Turilov 2001: 40–58). The *Miracle with George* and the *Miracle with Clement* describe events in a similar and mutually complementary manner. Through the creative decision to use the (ego-)accounts of two warriors from different social backgrounds, the hagiographer provides remarkably reliable historical information about the phases of the Byzantine-Bulgarian war of 894–896, the outcomes of battles, along with a multitude of related details.¹

Thus far, only the *Miracle with George* has an accessible English translation (Petkov 2008: 43–46). It must be explicitly emphasized that this Old Bulgarian story has been the subject of both strictly academic and broader interest myriad times, receiving countless instances of attention. On the other hand, one can be unequivocally said that the situation of *Miracle with Clement* is quite different. Regardless of the fact that this hagiographical story is significantly bigger in terms of the text volume, apart from just a few specific exceptions, it remains largely unknown and seldom within the focus of research interest. In addition to the modern Bulgarian translation, the *Miracle with Clement* has recently been translated into Russian and Polish (Leszka [transl. Wolski] 2016: 84–94; Polyvyanyy 2018: 354–357). However, this has not yet resulted in a really notable increase of its popularity among scholars (Mollov 2007: 223; Stoykova 2009: 140–141; Turilov 2005: 20–27; Hristov, Kostadinova 2023: 428–436; Hristov 2024b).

Does “Nothing new under the Sun” (Eccl. 1: 9) hold true?

Even against the background of these initial remarks on the both texts, it should be specified that this study takes no (strict) comparative approach for

¹ This information corresponds with evidences found in a variety of other contemporary and later sources (Cf. for example: Bekker 1838: 357–360; Büttner-Wobst 1897: 442; Vogt 1909: 16–18; Vanderstuyf 1914: 199–201; Kolias 1939: 76–91; Moravcsik, Jenkins 1967: 162–164, 250–252; Thurn 1973: 176–178; Rosenthal 1985: 31; Reuter 1992: 56, 131–136; Laiou 1996: 259–260; Wahlgren 2019: 205–207; Dennis 2010: 204–205, 452–455; Haldon 2021: 137–138.

various reasons. This is mainly because several such analyses in recently published etudes have been carried out—paying due attention to the different social profiles on the mentioned warriors, George and Clement, their different war-time obligations, as well as the features and differences in the description of their families (Hristov, Kostadinova 2023: 419–441; Hristov 2024b: 92–98; Hristov 2026: 49–65). There are also touches that address how these warriors, portrayed in the *Tale*, dealt with the traumatic warfare experience. Of course, given the storytelling modes of the era as well as the literary genre’s requirements, this is presented through the prism of their post-war fates and the vows that both George and Clement took before the patron saint-protector (Angelov 1971: 141–145, 146–151, 153; Sophoulis 2023: 87–98). At the same time, to some extent, the following lines tend to diverge from the “traditional” positivistic approach. This is not because the latter does not always lead to indisputably productive results when analyzing hagiographic texts. It is rather because of the undeniable achievements that have already been made in outlining and analyzing the dates concerning the Christianization of early medieval Bulgaria, the establishment of the local archbishopric and its episcopal organization, and the role of the Bulgarian ruler Boris I—Michael (852–889) in these processes as well as the coup that overthrew his eldest son and heir Vladimir (889–893), and the enthronement of his third son Symeon (893–927).² In the present short remarks, the main reasons also have their roots in the ambition to delve deeper into the more problematic aspects, and catch essential details concerning the cults of warrior saints. The aim is to clarify the parameters of the evolving religious practices in the late ninth—early tenth century. Additionally, efforts to trace the development and spread of this type of veneration within certain strata of early medieval Bulgarian society are inspired by a zeal to shed light not only on the creative patterns applied by the hagiographer, but also on the impact of them on the motivations of warriors, and on the factors that sustained troops fighting ability and during exhausting campaigns and in the face of heavy defeats in the newly Christianized Bulgaria.

Despite the numerous significant questions related to literary history, authorship and a variety of other concerns, the *Miracle with George* and the *Miracle with Clement* are considered part of a group of contemporary primary sources for the war of 894–896. As is well known, the relocation of Bulgarian exports from Constantinople to Thessaloniki, along with increases in relevant taxes, was the triggering event. This was followed by a failed diplomatic attempt to reinstate the previous trading regime. Ultimately, this resulted in the newly

²No matter how detailed the references concerning the information in the *Miracle with George* might be, any closer scrutiny of the enclosed bibliography will reveal gaps, when dealing with studies about Bulgarian political and church history. This is because the text has been known among scholars since the second quarter of the 19th century (See: Filaret [Rizhskiy] 1846: 5; Evgeniy [Astrakhanskiy] 1848: 249–250; Bodyanskiy 1855: 357–358; Palauzov 1852: 23–24; Golubinskiy 1871: 34, 256; Stroev 1848: 768; Leonid 1894: 45; Loparev 1894).

ascended ruler Symeon invaded Imperial territory, achieving victory on the battlefield and despoiling countryside.³ Regardless of initial Bulgarian successes and Byzantine engagements on the other fronts, the Emperor Leo VI (886–912) managed to counter the advance. However, the most decisive factor was not the Imperial army's advance or the naval progress towards the Danube estuary, but rather the involvement of the Magyars. At that time, they inhabited the lands between the Bug and the Dniester rivers, and were persuaded by the Byzantine envoy Niketas Skleros to ally with the Empire and attack Bulgaria from the rear. Symeon's initial attempts to counteract this were futile. The Magyars crossed the Danube twice, pillaging their way through Bulgarian territory, defeating his forces and capturing many non-combatants. Under pressure, the Bulgarian ruler was forced to start peace negotiations. Meanwhile, he formed an alliance with the Pechenegs, the Magyars' eastern neighbours at the time, crushing them and eliminating them from the conflict. This significantly altered the balance of power, resulting in a Bulgarian victory in the war (Bozhilov 1983: 87–94; Tougher 1997: 172–180; Howard-Johnston 2000: 342–356; Leszka 2011: 55–70; Hupchick 2017: 153–164; Leszka 2017: 81–114).

There are strong reasons to believe that the *Miracle with George* and the *Miracle with Clement* emerged immediately or shortly after the Bulgarian-Byzantine conflict in question. It is also plausible to assume that both stories most probably originated from the oral accounts of veterans who survived the fiercest stage of the war. It has been put even forward with a hypothesis that they may represent a kind of popular stories or military legend that spread among the common low-class people in early tenth-century Bulgaria (Dragova 1991a: 156–167; Dragova 1991b: 47–57).⁴ As has been specified, at some point in the tenth century, these stories were incorporated into the *Tale* as its fourth and ninth miracle stories (Turilov 1996: 81–99; Turilov 2000: 412–427; Hristov 2024b). The placement of the *Miracle with George* and the *Miracle with Clement* within a wider hagiographical collection, creates additional challenges for modern-day research efforts. It has to be acknowledged, however, that only a certain proportion of the problematic issues derive from the editorial interventions of the hagiographer (not even counting subsequent revisions and omissions by copyists). Undoubtedly, the hagiographer (who himself was unlikely first-hand witness or participant in the battles) rearranges the functional purpose of the orally transmitted accounts of veterans and the messages they convey, loading them with

³ This Byzantine-Bulgarian war has attracted considerable scholarly interest. It is not possible to provide a comprehensive overview of all studies within the limited framework of a single article (Zlatarski 1927: 283–323; Voynov 1967: 147–202; Tsankova-Petkova 1968: 167–200; Bozhilov 1971: 20–33; Fine 1983: 137–140; Oikonomides 1991: 241–248; Karayannopoulos 1994: 52–64. Recently with the enclosed bibliography: Kanev 2021: 119–168).

⁴ While this hypothesis offers significant benefits, additional clarifications are needed. For more on some similar discussions regarding the narrative of war and combatants' experience in Byzantium see: Sinclair 2012; McGrath 2018: 160–195.

a new meaning and additional emphases. It can be assumed with a high degree of credibility that the compiler of the *Tale* retained a significant proportion of the original information from his sources, despite the certain fictional aspects, necessity of their coherence in the internal logic and specific literary characteristics of the hagiographical narrative. Alongside this, it is worth noting that the compiler of the text provides a sufficiently clear outline of the general chronological order, referring to key historical figures and events of the second half of the ninth century (Angelov 1971: 137, 141, 152–155).

Additional interesting peculiarity is that the hostilities between the Bulgarians and Byzantines, including the causes of the war, defeats of the Imperial armies and subsequent despoiling of the so-called themes of Thrace and Macedonia, are notably absent from the records in the today's versions of the hagiographical stories in the center of this study. Instead, these narratives focus exclusively on the clashes with the Magyars. Judging by the available information, it is hard to determine the reasons for this peculiarity. It is probably related to the origin, education and intellectual influences that shaped the hagiographer's personal attitudes and creative preferences (Turilov 2000: 412–427). Another possibility is that it is due to the time at which the *Tale* was composed. During a period of peace and good relations between Byzantium and Bulgaria, notices of hostility in widely circulated hagiographical works intended to provide moral guidance and offer examples of proper Christian behavior would certainly have influenced the attitudes of the audience. Of course, it cannot be ruled out that data on Tsar Symeon's campaigns in Eastern Thrace during the war of 894–896 was completely absent from the primary sources used by the hagiographer. This is not implausible, especially given that the veterans, on whose accounts the miracle stories are based, participated in the squadrons that clashed with the Magyars but were not part of units deployed southwards against the Empire. The intriguing lines given the matter at hand in the *Miracle with George* of reads as follows:

When he [Boris I – Michael – Y.H.] was still living as a monk and Vladimir his first son, ruled in his stead, by Michael's and God's will Symeon overthrew his brother and sat on the throne. Then the Magyars rose against him and captured his people; he fought them but they won in that year. And I [the Bulgarian warrior, named George – Y.H.] *took part in this fight*, too (Angelov 1971: 141).⁵ When the Magyars gave us the chase, fifty of us took the same road. They followed us, and my horse began to get weary. I called out loud: "Oh, Lord God of the Christians! Help me and deliver me through the prayers of the great martyr George!" Then I turned to Saint George and said: "Saint George, when I took the holy baptism, the priest gave me your name. I am

⁵ This version of the italicized phrase is closer to the Old Bulgarian text. Therefore, I prefer to enclose it, rather than using "*fought in the war*", according to the published English translation (Petkov 2008: 44).

your servant, save me now from the pagans!” Then the right front leg of my horse sunk into the earth and broke but my comrades kept riding on. There was a small thicket in a gully there. I strung my bow, took the arrows in my hand, and ran toward it and away from my horse. Looking over my shoulder, I saw the Magyars closing on the horse, and I cried aloud: “Lord Jesus Christ, have mercy on me and send me the one who pleases you, the martyr George, to protect me and save me in this hour!” (Petkov 2008: 44–45).

In the *Miracle with Clement* another no less remarkable record reads:

Father, when along the ruler [Symeon – Y.H.] himself I took part in the battle with the Magyars and they beat us and defeated us, and we fled, I began to see nothing, God is my witness, I could not even see my horse’s mane. And I began to suffer, unable to see and not knowing where to turn. From all sides I heard the clatter of horses, and people falling and being trampled, and their shouts. I began to scream, saying to myself: have the Magyars stabbed me? Since there was no-one, I said, as if awakened from a dream, “Lord Jesus Christ, have mercy on me, and send thy servant, the great confessor and martyr George, to deliver me, for I see not, and perish evilly.” (Angelov 1971: 148).⁶

In the following lines both stories depict the warriors, George and Clement, as being saved from hopeless situation in a manner characteristic of the hagiographical literature of the epoch. However, the saint is presented differently in each of the two mentioned texts. In the first one, the personal desperate request of George to his patron saint, described quite unambiguously, is followed by the motive of miraculous deliverance and movement over a huge distance. Without any deliberate subjectivity or kind of overemphasis at the expense of the more well-known *Miracle with George*, which (as has been mentioned above) is far more often in the center of the scholars’ interest, it should be noted that *Miracle with Clement* transcendental intervention of the warrior saint follows other, seemingly more intriguing narrative models. The latter have the potential to unfold revealing and productive parallels. This is largely because within its framework the compiler of the Old Bulgarian hagiographical collection portrays Saint George as a young equestrian, spearman who is directly involved in combat and repels the Magyars’ onslaught against the protagonist. The text reads:

When he came, he took the reins, but I could not see who or what he was, thinking that one of our boyars had attached his servant to me. And he led me three yards without saying anything to me, and let me go, and said to me, “You are on the road now, go.” I said to him, “I do not see,” and he said to me, “Pray to God and to Saint George, and he will bring you”. And as

⁶ For the Symeon’s campaigns against Magyars in the war of 894–896 see: Bozhilov 1971: 20–33; Angelov, Tcholanov, Kashev 1983: 254–262; Dimitrov 1998: 29–37; Dimitrov 2011: 152–164.

soon as he had spoken these words I looked, but saw no one. I saw four men on horses. And as soon as they saw me, they rushed at me. I recognized that they were not ours but Magyars. And I cried with a loud voice: "Lord, have mercy on me, Saint George, save me." And at that moment on my right side on a white horse [...] When he faced them, he knocked down one of them, and the other three I did not see where they had gone. Seeing this, I glorified God and Saint George.

And after I had walked for a while, I saw fifteen men. As soon as they saw me, they rushed towards me. And I cried out, "Saint George, help me and deliver me!" And again, the rider, on the same horse, holding a spear, and on it a cross. And I said, "This is he who before drove three of them away." And I did not see where all those went (Angelov 1971: 148–149).

In a recent essay on warfare and captivity in the *Tale*, I had the opportunity to remind of R. Morris's idea that these somewhat naïve and seemingly fictitious motives for miraculous intervention and saintly protection arose because the authorities had failed to protect the local communities and were powerless in times of disaster (Morris 1995: 114; Hristov, Kostadinova 2023: 421). When referring to narratives concerning miraculous protection and intercession of this kind, it should be explicitly acknowledged that some of the most emblematic and widely recognizable examples in the Byzantine-Slavic world of the Balkans during the Middle Ages come from the *Miracles* of Saint Demetrius. More precisely, from a book of fifteen texts composed by John, Archbishop of Thessaloniki, in the first quarter of the seventh century (Barišić 1953: 33–80; Lemerle 1981: 26–81; Skedros 1999: 107–115). More than thirty years ago, while looking into the origins of the cult of Saint George, Christopher Walter pointed out this similarity, noting that "...*Saint Demetrius also intervened in battle*" and that in some cases the saint is described as "...*wearing a white cloak, seated on a white horse...*" (Walter 1995: 311; Atanasov 2001).⁸ A little later, at the end of the 1990s and the beginning of the 2000s, the aforementioned scholar, addressing the cult of Saint Theodore and the other Byzantine warrior saints, specifies that these saints are predominantly responsible for providing miraculous help and protection in battles, but not exclusively. Walter additionally draws attention to two key points. Firstly, the fact that in this regard, the late antique and early medieval authors

⁷ Missing part in the manuscript (Angelov 1971: 148).

⁸ The repulsion of the great Avar-Slavic siege of 586 is recounted in *Miracles I. 13*, along with details of relevant historical information, Saint Demetrius is presented as heavily armed warrior and wall defender in a pivotal moment of the siege (Lemerle 1979: 135). The resemblance of the Old Bulgarian *Miracle with Clement* to *Miracles I. 14* is even more striking given that, in this part of the voluminous Byzantine collection, the warrior saint is not only described as participating directly in the fights against pagan barbarians, but also as being dressed in white and riding a white horse (Lemerle 1979: 157).

seemingly reuse previous pre-Christian models for representing Dioskouroi twin-brothers' appearance in the battle (for the interventions of Castor and Pollux, dressed in white and riding white horses see: Pritchett 1979: 11–46; Platt 2018: 229–256; Gartrell 2023: 13–33). Secondly, he notes the fifth-century account in Theodoret of Cyrrhus' *Ecclesiastical History* concerning the similarly described intercession of the Apostles Saints, John and Philip, on behalf of Emperor Theodosius I, as well as the reference in *De Administrando Imperio* to the intervention of Saint Andrew in favor of the city of Patras (Walter 1999: 163–210; Walter 2003: 133–134; Theodoret, Bishop of Cyrrhus 1843: 323–324; Moravcsik, Jenkins 1967: 228–232; Zuckerman 1988: 191–210). In this regard, Anthony Kaldellis has recently made a valuable contribution by offering intriguing insights into the rewriting of an ancient “template” in the accounts of Saint Theodore's intervention in the battle of Dorostorum (present-day Silistra, Bulgaria) during Emperor John I Tzimiskes' Balkan campaign in 971, as recorded by Leo the Deacon and John Skylitzes. Additionally, he mentions that Saint Ignatius also should be included in the list of saints who appear on white horse in a military context in the Byzantine post-Iconoclastic hagiographical literature from the late ninth – early tenth century (Kaldellis 2013: 1–18; Smithies, Duffy 2013: xxxi, 54, 114).

In view of the mentioned above, the influence of specific Byzantine literature patterns on the *Tale* in portraying Saint George is beyond doubt. At the same time, the additional connotations that the compiler imparts to the audience of the hagiographical work are particularly intriguing. In the *Miracle with George* the author unequivocally makes it clear that strict obedience to the orders of the patron saint extends supernatural protection not only to a namesake devotee, but also to his comrades-in-arms and his war horse. The line of unambiguous open suggestions regarding Christian morals and socially acceptable behavior continues, as does the concept of saint's patronage and assistance. This is not only obvious in this particular miracle story incorporated in the *Tale*, but throughout the entire Old Bulgarian hagiographical collection. As these texts record sick and ailing family members, neighbors and fellow travellers receive healing, help and protection (Angelov 1971: 141–142, 143, 145, 146–147; Hristov, Kostadinova 2022: 95–117).

The presence of textual borrowings and instances of re-use are not limited to the hagiographical *topoi*, inherent to the portraying of Byzantine warrior saints. References to the *Old* and *New Testament* in the *Miracle with George* and the *Miracle with Clement* are no less remarkable and intriguing, given the necessity to employ familiar mindsets and understandable patterns for the members of early medieval Bulgarian society. In fact, current research in this area still has much to offer. This is surprising to a certain extent when it comes to the *Miracle with George*, considering its widespread use as a “conventional” historical primary source. For example, Kiril Marinow (an esteemed Polish scholar of Bulgarian origin) quite recently draws attention to the textual

dependence of the description of Saint George's appearance in the delivered warrior's dream to *Exodus* 33: 20 and *Acts* 9: 5 (Angelov 1971: 142). It is worth noting that this peculiarity has been omitted not only in the English translation of the miracle story in question, but also in the published Old Bulgarian versions of the text, as well as in the modern Bulgarian, Russian and Polish translations. Of course, it should be emphasized that specified lacks are not the only issue in this respect. When preparing the modern Bulgarian translation of the *Tale*, Maria Spasova highlights several key references within the framework of the *Miracle with Clement*. These include "Do not let the Sun go down while you are still angry" (*Ephesians* 4: 26); "Do not repay anyone evil for evil" (*Romans* 12: 17); with a slightly different, but still easily recognizable version of the phrase on revenge (according to *Romans* 12: 19); and "...love your enemies and pray for those who curse you, do good to those who hate you" (*Matthew* 5: 44; Spasova 2007: 207).

Unlike the above-mentioned quotations, which are largely literal or closely follow the text of the cited verses in the *New Testament* and the *Acts of the Apostles*, close scrutiny reveals that in this part of the *Miracle with Clement* the hagiographer seemingly tends to use more free phrasing in addition. Notably, instances of a kind of loose, not entirely strict rewriting occur precisely in the passage considering the orders given by Saint George.

...You, Clement, keep yourself from all evil. Do not covet another woman, nor insult widows, nor do violence to an orphan, do not covet another's property; do not envy a high rank; do not torment slaves (servants), but be merciful to them, give them food and clothing, free the old for your soul's sake, that you may obtain mercy and rest ... (Angelov 1971: 150).

The latter feature is most likely the reason why tracing these "hidden" (not fully literal) references in complete detail is still an ongoing task. For now, they remain largely overlooked in both editions of the Old Bulgarian text and in its modern translations. They refer to the moral observance (according to *Exodus* 20: 17 and *Deuteronomy* 5: 21), condemning violence against widows and orphans (*Exodus* 22: 22), and encompass specific requirements for providing food and clothing for servants (omitting the specification that the biblical text concerns co-coreligionists and tribesmen), as well as a merciful attitude (as found in *Exodus* 20: 7–10; *Deuteronomy* 15: 12–18 and *Leviticus* 25: 39–43). Their focus on chastity, charity and protecting the vulnerable and underprivileged members of society is beyond doubt. In fact, at the time the text was written, the hagiographer had very real reasons for offering such guidance to his audience, given the consequences of the war. Following the initial heavy blows dealt by the Magyars to the Bulgarian rear, there are sufficient grounds to assume that widows, orphans and those who had fallen into poverty and deprivation after ruin and despoiling of their households were

probably familiar sights for the surviving warriors, such as Clement (Stanev 2008: 9–24). In addition, it is also important to note that scholars have long emphasized the need for caution when interpreting passages in Byzantine hagiography that refer to widows and orphans, due to the fact that these often employ literary *topoi* (Rudakov 1917 [1997]: 180–183). However, at this stage, one more notable detail should not be ruled out. While acknowledging the significant differences in volume, type of the texts and their thematic scope, issues related to charity and help provided to the needy as well as attitudes towards widows and their fate in widowhood, are discussed in *Resposa Nicolai I. Papae ad consulta Bulgarorum* (Detchev 1922[1998]: 90–92, 96–99). An expanded version of this subject can also be found in *Patriarch Photius' Letter to the Bulgarian Prince Boris–Michael*, in which the Christian duty to help and protect the poor, widowed and orphaned is emphasized. And this is not so much viewed as a matter of assistance, but rather as the moral obligation of the ruler and his entourage (White, Berrigan 1982).

Against this background, it is important to bear in mind that identical or very similar phrases as well as longer sections, can often be found in a large number of Byzantine hagiographical works, despite being written by different authors at various conditions, places and times. The extent to which these rewritings varied is wide-ranging, from the unskilled copying of an earlier text (or group of texts) to impressive adaptations and incorporations of *topoi*, phrases or models, which are not always easily traceable (Pratsch 2005). Deriving from certain prototypes and primary sources, the results could be an alternative version of the already known literary work (shorter, longer, more sophisticated, etc.), or a completely new text dealing with other protagonists, and different saints and plots (Constantinou 2021: 328; Rydén 2002: 547–552; Messis 2014: 313–332; Efthymiadis 2021: 348–364). This literary technique of merging original parts, oral accounts and borrowings, and transferring fragments and patterns of various works enables the compiler of the *Tale* to employ a productive creative approach and successfully build remarkable hagiographical work. Not only the *Miracle with George* and the *Miracle with Clement*, but the entire collection features multitude of characters, both fictitious and inspired by real people, and touches on many details concerning daily life and major historical events in Southeastern Europe. The author's erudition is impressive, as is his decision to avoid easy solutions when popularizing the cult of Saint George. Instead, he offers practices and examples that are accessible, close and relevant for the newly converted Bulgarian society, reflecting its attitudes and addressing the challenges it faced in the late ninth century. Equally striking is how his creative efforts differ from the main line of development of original hagiographic prose in Bulgaria at that time, aligning more closely with the trends and topics characteristic of such works in Byzantium and the Eastern Mediterranean (Bozhilov 1995: 307–335; Stoykova 2008: 130–142; Angusheva et al. 2015: 213–276).

Conclusion

There can be hardly any serious doubt that *Miracle with George* and the *Miracle with Clement* provide a picturesque and contemporary Old Bulgarian perspectives on the battlefield havoc, including the captures and pursuits. Even with certain hesitation, given their literary genre, it can be said that both texts recreate the horror of defeat and provide insights on the low survival rate amidst the desperate flight of the rank-and file warriors during the initial attempt to repel the Magyars in the carnage early stages of the war of 894–896. From a broader perspective, they also refer to the limited ability of the late ninth-century Bulgaria to wage war on two fronts simultaneously, exposing its heartland and the surrounding crucial areas on the both sides of the Lower Danube in present-day Southeastern Romania and Northeastern Bulgaria to enemy attacks. Ultimately, this failed to protect significant number of non-combatants from captivity, deportation, or killing, causing mass-breaking of the families, widowhood and orphanage. It also had a long-term impact and undermined economic activity and provincial daily life in the affected zones due to devastation caused by plundering and burning down of the settlements, and the loss of population, goods and livestock.

With the clear understanding that the present lines fall far from claiming to fill all the gaps, nor do they exhaust all the questions of the primary sources and textual borrowing made by the compiler of the *Tale*, it is worth noting that at least part of his creative decisions might be due to the audience traumatic experience of the war of 894–896. However, it should be borne in mind that the *Miracle with George* and the *Miracle with Clement* are not historical or chorographical narratives in the strict sense, but hagiographical constructs. Respectfully, the edited and rearranged accounts of the veterans focus on supernatural protection, moral lessons, and saintly patronage. In this regard, all evident or more subtle rewritings, as well as the use of hagiographical *topoi* and compilations, are a result of the overarching idea to glorify Saint George and to establish and strengthen evolving religious practices in the newly Christianized society. Both texts provide illuminating insights into how late ninth–early tenth-century medieval Bulgarian society processed crushing military defeats. They reveal how the cult of Christian warrior saints was used to transform the experience of the surviving combatants into means of popularizing the concept of miraculous protection and its role in sustaining the fighting abilities of troops. Against this background, due attention also should be paid to the fact that the hagiographical patterns and literary models employed in the *Miracle with George* and the *Miracle with Clement* enrich modern-day understanding of how such cults of Byzantine warrior saints entered and spread in non-Byzantine Balkan Orthodox societies. They prompt further interdisciplinary research into literary history, textual rewriting and dependencies in the so-called *Slavia Orthodoxa*, once again reaffirming the potential of hagiography as a key source for studying major historical events and processes, as well as and dynamics at the popular level.

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Orthodox Christian-Muslim Encounters in Early Ottoman Central Rumeli: Textual Perspectives from South Slavic Literature

Abstract: The article examines narratives of the Orthodox Christian-Muslim encounters in the early Ottoman Central Rumeli (15th–17th centuries), with a focus on the depiction of events and interactions in a variety of Orthodox Christian textual sources: hagiographies of saints and new martyrs, stories of relic translations, Damaskin collections, and marginal notes (pripiski). The sources illustrate a wide range of interactions, from day-to-day social contacts to acts of confrontation and trials of faith. Encounters with Muslims are divided into two groups: encounters with Muslim authorities and encounters with ordinary Muslims. The article aims to identify characteristics of images of Muslims that are stable across genres and over time, as well as patterns unique to certain sources. Dynamic changes in the representation of inter-religious encounters are traced when possible. Analyzing the sources, the author puts Orthodox Christian images of Muslims in the context of their perception of the Ottoman conquest and the sultan authority. The author highlights the main differences in the representation of encounters with two groups of Muslims: while life under the Ottoman rule became a familiar environment, which made interactions with Ottoman authorities rather practical and more or less “peaceful”, with certain shifts and variety in the image of the sultan, encounters with ordinary Muslims remain a source of tension and conflict throughout the period under consideration. The author concludes that Orthodox Christians built a framework of double normality that combined adaptability to the Ottoman political and social realities with efforts to preserve their identity and resist the influence of Islam.

Keywords: *Christian-Muslim relations, Interreligious encounters, Ottoman Balkans, Central Rumeli*

The Ottoman conquest of the Balkans led to profound changes in the political, social, and religious landscape of the Balkan lands. Under the new conditions, Orthodox Christians in Ottoman Rumeli developed a complex system of interactions, conflicts, and adaptation to the constant presence of the Muslim population. The article is focused on Orthodox Christians, as the Catholics’ perception of Muslims developed within different political and doctrinal frameworks and would require separate study. Within this multi-confessional environment, specific models of perceiving the Muslim as the “Other” took shape. Mutual images of Muslims and Christians in written sources from the Ottoman period are important for the understanding of interreligious relations in the Bal-

kans in a broader perspective. Christian authors outline the boundaries of their community and their attitude toward the “Other”, expecting readers to follow the set example. The article focuses on Christian perspectives (on Muslim perspectives: Bondarenko 2024; Rusev 2024), examining encounters between Orthodox Christians and Muslims in 15th–17th century Central Rumeli as reflected in various written sources produced by literati: marginal notes, lives of saints, stories of relic translations, and Damaskin collections. The study focuses on the typology of interreligious encounters and on the ways in which different literature genres shape their representation according to narrative functions and purposes. Special attention is paid to the distinction between Christian attitudes to the Ottoman state as the institutional framework of their existence, their encounters with its representatives, and their everyday coexistence with the Muslim community. Through this approach, the article aims to identify patterns that remain stable across genres and over time, as well as features, unique to certain sources, while attempting to trace shifts in any specific image when possible.

The period of the 15th–17th centuries allows us to trace both the stable elements of the images and the changes in them from the period of conquest and initial consolidation of the Ottoman state to the later phases of the state development. Although the genre specificities of the sources under consideration do not allow for a uniform tracing of the dynamics of the images throughout the entire period of the 15th–17th centuries (for example, Damaskin collections’ rapid development as a genre started only in the late 16th–early 17th centuries (Radoslavova 2020: 12), a comparative analysis of similar images present in texts of different centuries and genres makes it possible to identify the main tendencies in the development of the image of Muslims.

Sources

Marginal notes (primary, or authorial, and secondary, written by later readers (Bozhilov 1983; Nachev, Fermandzhiev 1984; Hristova, Karadzhova, Uzunova 2003; Hristova, Karadzhova, Uzunova 2004), represent personal records, essentially not intended for external use. Although they were not designed for a wide audience, they often became an element of communication with the future holder of the book—whether an instruction to be righteous, an apology for possible errors, complaints about the hardships of life, or a curse for a potential thief. K. Petrovszky suggests that one of the main ideas behind the taking of notes is “giving account” before God, a practice rooted in the New Testament. Opening formulas like “let it be known” imply that the authors wanted to report their actions as God-pleasing (Petrovszky 2017: 496–498). The 17th century marks a prominent shift in the nature of marginal notes. Marginal notes became increasingly non-monastic, the authors were of diverse secular background. The overall number of notes, in comparison to the 16th century, according to estimations, doubled, due to the trend towards the language democratization in literature that can be observed in other types of sources, such as

Damaskin collections (Petrovsky 2017: 501–502). The description of Muslims was not the main goal of the authors. Nevertheless, marginal notes are a reflection of people's living reaction to existence within the framework of an Islamic state and interaction with Muslims. Therefore, they demonstrate the framework of the worldview in which the works were created and transmitted and in which literary representations of Muslims were formed.

As for the lives of martyrs, the study is based on the lives of St. George's the New of Kratovo (by birth), or of Sofia where he accepted martyrdom in the early 16th century (Ivanova 1986: 291–308), and St. Nicholas the New of Sofia, who accepted martyrdom in the mid-16th century (Ivanova 1986: 308–376). In them, the reality of Christians and Muslims living in one city and being inevitably forced to interact and share space is well reflected. They are vivid examples of the hagiographic genre and provide extensive information about the coexistence of Christians and Muslims in the 16th century. Balkan lives of the new martyrs are dedicated to people of the most diverse origin: representatives of Balkan and non-Balkan peoples, young and old, poor and prosperous, laypeople and church hierarchs (Kaliganov 2006: 260). Despite such diversity of heroes, Balkan lives of saints demonstrate that regardless of origin or social position, anyone could suffer in the case of too close contact with the Muslim community, which often became the main cause of the saints' conflicts with Muslims.

Another important hagiography is the "Life of Despot Stefan Lazarević" (15th century, Constantine of Kostenets) (Totomanova 1993: 136–204), written by order of Serbian Patriarch Nikon by a close associate of the despot. This work should be approached as hagiographic literature with some caution. Constantine of Kostenets himself claims that he wrote not only a hagiography but also a chronicle (Totomanova 1993: 191). Indeed, the narrative reflects the historical chronology of events, and the accuracy of some descriptions is even confirmed by archaeological data (Radošević 1986: 446). At the same time, the work is certainly hagiographic. Stefan Lazarević is likened to Moses, Jesus, Joshua, David, Solomon, and other prominent figures, which reinforced the image of Stefan Lazarević as a legitimate defender of Christians. Belgrade is compared to the New Jerusalem and Constantinople, emphasizing the sacred status of the city (Vasiljević 2021: 55–56, 239–240). N. Gagova identifies the following genre elements of the "Life of Stefan Lazarević": an extended life, a chronicle, and a panegyric (Gagova 2009).

Stories of relic translations, a recurring motif, illustrate Christians' efforts to preserve sacred relics under Ottoman rule. Examples include "A Word of Praise of Philothea" (late 14th century, Joasaph Bdinski) (Grasheva 1982: 187–200), which contains an episode of interest for the present study. In the conditions of the Ottoman conquest, people were concerned about the fate of the symbols of the Christian faith, therefore, these stories were particularly relevant (Ivanova 1986: 24). The movement of relics can be considered *translatio Imperii*—the symbolic transfer of grace and the legitimacy to the new capital. (Bilyarski, Kuyumdzhieva 2024: 368) The motivation for the translation of

relics could vary. For example, the legitimization of a ruler's authority or the spiritual protection of a city could be supported by the accumulation of relics translated from other places (Vasiljević 2021: 380–382). Metropolitan Joasaph Bdinski speaks eloquently not only about Muslims, but also about Christians who converted to Islam, which is of particular interest. “The Story of the Translation of the Relics of St. Petka of Tarnovo to Vidin and Belgrade” (15th century, Gregory Tsamblak) (Ivanova 1986: 380–382) and “The Story of the Translation of the Relics of St. John of Rila to the Rila Monastery” (15th century, Vladislav The Grammarian) (Ivanova 1986: 383–391) were not created as independent works. “The Story of the Translation of the Relics of St. John of Rila to the Rila Monastery” (“The Rila Tale”) was intended as a supplement to the life of Ivan of Rila written by Patriarch Euthymius. It is distinguished by a striving for historicism and a consistent recording of what happened, despite the presence of episodes characteristic of the genre describing miracles (Kaliganov 1997: 804–806). “The Translation of the Relics of Petka of Tarnovo” was written by Gregory Tsamblak as a continuation of the life of Petka of Tarnovo authored by Patriarch Euthymius. Nevertheless, both works may be considered independent (Ivanova 1986: 23–24). Despite the fact that they are additions to lives of saints, they describe in considerable detail and quite openly the encounters of the bearers of the relics with the Ottoman authorities and ordinary Muslims.

Hagiographic literature and stories about the translation of relics allow us to analyze the images of Muslims in their diversity: individual and collective images, ordinary Muslims, judges, and even the sultan. Since characters may experience similar scenarios of interaction with Muslims, it becomes possible to identify both stable characteristics of the images of Muslims and those unique to particular works.

The lives of the new martyrs are edifying stories that shape in readers and listeners the image of the Muslim. Although their content was widely distributed, this is rather intellectual literature, whereas Damaskin collections were intended precisely for mass use (Demina 1985: 17–23). The first translations of Damaskinos Studites’ “Thesaurus” from the 16th–early 17th century, written in the traditional literary language, are considered archaic by scholars (Radoslavova 2020: 17). These translations did not gain very wide circulation (Braga 2023: 17–18). In the 17th century, the so-called literary language on a popular basis was formed – a written language accessible to all readers and listeners, which encouraged the distribution of Damaskin collections that included both texts from the “Thesaurus” and non-Damaskin sermons (Braga 2023: 20–25). In the present article, the Tikhonravov Damaskin from the 17th century is examined (Demina 1971). The popularization of Damaskin collections was facilitated by the simple and understandable language in which they were written. It is also worth noting that the tendency toward the deliberate democratization of language can be observed in an earlier period as well. In the preface, Pop Peyo assures that the life of St. George “will be easy for the simple and the ignorant

to understand” (Ivanova 1986: 295). The subsequent popularity of the saint’s cult in Macedonia, Serbia, and Russia (heavily supported and promoted by the Church hierarchs and especially Mount Athos (Kiel 1985: 319–321)) demonstrated the potential of such an approach to the language of presentation as a tool of a saint’s cult dissemination (Kaliganov 1997: 820–821). According to O. Mladenova and B. Velcheva, an eschatological motif is observed in Damaskin collections, connected with the sense of a prolonged crisis in the Balkans in the 17th century: famine, wars, natural disasters. People sought moral support, and Damaskin collections provided it by reminding them of God’s order and retribution after the Last Judgment. It is possible that precisely the “Word on the Second Coming” was the first translated work of Damaskinos Studites (Mladenova, Velcheva 2013: 29–32).

Damaskin collections are a source that reveals how, under the conditions of Ottoman rule, mass representations of the world, history, and religious identity were formed and transmitted. As popular edifying literature, they contributed to the comprehension of the Christian past in the consciousness of a broad audience and fixed value orientations that corresponded to the needs of Christians living in a Muslim state.

Some sources such as “Life of Despot Stefan Lazarević”, “A Word of Praise of Philothea”, “The Story of the Translation of the Relics of St. Petka of Tarnovo to Vidin and Belgrade, were produced outside the Ottoman territories. This created specific political and cultural contexts that influenced, to varying degrees, their representation of Muslims and Ottoman power.

It should be noted that images reflect not only the real perception of Muslims and Christians toward one another, but also the didactic intention of the authors, who instruct readers and listeners to perceive Muslims in a certain way. Nevertheless, the study of the image of Muslims in Christian narratives allows us, to a certain extent, to analyze Christians’ actual perception of Muslims, since the works influenced the consciousness and sentiments of readers and listeners, and also to understand how the Church coped with the necessity of regulating the relations of the flock with representatives of another religion and what it expected from a righteous Christian. In addition, the works are not free from the canons and stereotypes of their genres, which add tropes and characteristics that served the purposes set by the authors. Thus, the dynamics are manifested not in a change of the images, but in the variability of their functions and nuances depending on the genre and the purpose of the work.

We can classify the encounters between Christians and Muslims in two ways: interactions with people of power that can be quite diverse, ranging from negative to neutrally-positive, and interactions with ordinary Muslims, usually full of conflicts and fear. We will analyze encounters with authorities in all considered sources, and then those with ordinary Muslims. However, first of all, we need to define the perception of the Ottoman conquest that can be considered a frame, in which the encounters with Muslims existed.

Perceptions of Ottoman Rule in Christian written sources

It should be noted that the very fact of the conquest throughout the entire period under consideration is perceived as divine punishment. For example, the monks of the Rila monastery could not believe that the coffin with the relics of St. Ivan of Rila was indeed located in Tarnovo, since they were convinced that God had delivered the city into the hands of the “barbarians” because of the sins of the Christians and that all holy objects had been plundered (Ivanova 1986: 385–386). A note to the “Nomocanon” of Dimitar Kratovski, dated 1466, states: “Woe to our lands! And others, because of the calamity that God brought upon us, were struck by the edge of the sword” (Hristova, Karadzhova, Uzunova 2003: 142). Damaskin collections reflect the same perception of the conquest. The basis of Damaskin collections consists of stories narrating about earlier times. However, by including Old Bulgarian works in Damaskin collection, the authors did not simply copy them, but created new redactions in which an anti-Ottoman tendency can be observed, within the framework of which the circumstances of the sufferings of George the Victorious, Demetrius of Thessaloniki, and others were compared with Ottoman reality (Kaliganov 1997: 822–823). Undoubtedly, to a large extent this is connected with the attempt to explain realities that had lost their relevance in terms understandable to the audience. For example, in a marginal note in the Tikhonravov Damaskin collection, an explanation of the word “stratilat” is given: “in Turkish it is called the agha of the janissaries” (Demina 1971: 70). This modernization of the language made the story easier to understand (Petkanova-Toteva 1965: 214–230) and, at the same time, was bound to provoke associations with the Ottoman time. Reflecting on the exceptional popularity of the “Thesaurus” of Damaskinos Studites precisely in the Greek and Bulgarian lands, G. Del’Agata identified the following reasons: a similar ideological front (anti-Muslim and anti-Catholic), similar expectations of the readers (interest in a variety of historical, geographical, and ethical knowledge connected with the problems of the present) (Del’Agata 1999: 51). Even though there are many reasons for the popularity of Damaskin collections, the anti-Muslim character of the genre undoubtedly constitutes one of them (Radoslavova 2020: 206–209).

Thus, stories connected with the distant past are transferred into the contemporary conditions of Ottoman rule. For example, in one of the miracles of St. Nicholas of Myra—the defense of Thessaloniki from a barbarian invasion during the time of Emperor Maurice—the invaders are initially called “Avars,” and then the formulation “Hagarene power, that is, Turkish power” (Demina 1971: 109) appears. In relation to the Avars / Hagarenes / Turks, expressions such as “evil people” (Demina 1971: 109), “devilish captivity” (Demina 1971: 110) are used. The account of St. Demetrius of Myra ends with the saint meeting St. Achillius of Larissa, and both of them weep because they had to leave their cities, for they would be handed over into the hands of the Turks (Demina 1971: 111).

Not only the conquest of the Balkan states itself, but also the military campaigns witnessed by Christians as Ottoman subjects were perceived negatively. This was especially manifested in marginal notes, which reacted vividly to the surrounding reality. For example, a 17th century marginal note in a 16th-century “Apocryphal Collection”: “I, priest Petar, write this so that it may be known what kind of time it was when I was a priest in the village of Mirkovo. And there was also priest Stoyan, together we held the village of Mirkovo under the impious tsar Sultan Mehmed, may God kill him and strike him down, for he ruined the Christian faith and great cities”. (Nachev, Fermandzhiev 1984: 300). Priest Peter describes Mehmed IV’s (1648 – 1687) and Suleiman III’s (1687 – 1691) military actions in the Austrian lands and its consequences for Balkan Christians (Nachev, Fermandzhiev 1984: 300). When Ottoman troops set out on campaign, they stopped in Balkan settlements, evidently demanding provisions, and the authorities increased the tax burden, which could lead to mass famine and shortages. For example, a marginal note in a 16th-century “Flowery Triodion”: “Great signs and wonders in the eighth millennium, when the young Turkish tsar named Murad went out to Dreno field. Then there was great famine and evil for the Christians, because the army went down toward Rome, and they stopped the grain and took tax on the harvest... Then people did not eat bread for ten days and died of hunger, and the grain was carried through the villages... Then there was great evil among the people” (Bozhilov 1983: 118). Or a marginal note to a 17th century “Collection from the Zograf Monastery”: “In the year 1688. Let it be known when the moon darkened on the 14th day of the month of September, at dawn. And at that time the impious Turkish people were waging war against the Germans. And Tsar Suleiman then sat in Sofia with all his force” (Nachev, Fermandzhiev 1984: 84).

Accordingly, Muslim victories were perceived as tragedy. A marginal note in a 16th-century “Liturgical Book from the Ravanica Monastery”: “The eastern lands were ruled by Sultan Suleiman and like a winged serpent, flying over water and land, he captured the Hungarian land and attacked the city of Sziget; there his name perished with noise and at the place of the battle he left his foul bones under Sziget. Oh, what torment there was then for the Christian people and for all the western lands from the lawless Hagarenes. Has heaven and earth ever heard of such inhumanity!” (Nachev, Fermandzhiev 1984: 65)

Encounters with Muslim authorities

With this framework of perception of the conquest in mind, we can proceed to analyze Christians’ encounters with Muslim authorities. Some of these interactions could be described as indirect or even passive, from the standpoint of subjects who understand their position of Christians under the Muslim rule and have to define their attitude towards the sultan’s power. Other interactions are direct, such as encounters with kadis, actual interactions with the sultan, and others.

The sultan

The most prominent person of authority is the sultan. During the period under consideration, the authority of the sultan was already perceived as a given. At the end of some notes, one encounters formulations such as the note from 1564 (in the “Festal Menaion”): “under Tsar Sultan Suleiman and under the bishop of Sofia Diomidius” (Hristova, Karadzhova, Uzunova 2004: 17–18). We observe a kind of dual allegiance – political to the sultan and spiritual to the Christian metropolitans and bishops. This formula is not new – even before the Ottoman period it was used with regard to the Orthodox ruler and the head of the Church, but in Ottoman times it received a new interpretation. O. Todorova, analyzing Priest Synadinus’ notes (the Serres Chronicle from the 17th century), reflects that the sultan is called simultaneously padishah and basileus (Todorova 2010: 92). The projection of the Byzantine title onto the sultan shows that he was perceived not as a foreign ruler, but as the legitimate governor of the Christian lands (Makarova 2005: 89).

The image of the sultan as a person is not unambiguous. In the “Life of Despot Stefan Lazarević” from the 15th century, for example, Sultan Bayezid is presented rather neutrally. According to the Life, Stefan Lazarević keeps his oath to the sultan to do good for his children even after his death, which influences the despot’s participation in the internecine struggle between Bayezid’s sons (Totomanova 1993: 183). The sultan himself calls Stefan his “greatest and most beloved son” (Totomanova 1993: 153). It can be said that here the sultan appears as a higher partner who considers the Despot almost equal, without clearly expressed negative traits. “The Story of the Translation of the Relics of St. Ivan of Rila” presents the interaction with the sultan and with the Ottoman authorities in general in a rather neutral manner, as an administrative procedure. The meeting of Mara Branković with Sultan Mehmed is not even described in detail. The author merely reports that “the autocratic great amir Mohammed, who then held the royal scepter,” did not disappoint her hopes (Ivanova 1986: 386). Also, in the context of the construction of a new system of allegiance and the legitimization of sultanic authority through “familiar” Byzantine symbols, the symbolism of the fact that the sultan is called the holder of the royal scepter should be noted. In the “Story of the Translation of the Relics of Petka of Tarnovo,” the sultan is not a completely neutral figure—he mocks the Christians because he does not understand the value of the relics of St. Petka (Ivanova 1986: 381). He is called the “barbarian king” (Ivanova 1986: 380), “tormentor” (Ivanova 1986: 381). Nevertheless, the sultan appreciates the diligence of the Christians and shows willingness to cooperate (Ivanova 1986: 381). This characterization serves as a contrast that highlights the virtues of the noble Christians who petitioned for permission to transfer the relics. Thus, encounters with the sultan may have diverse meanings, even when they follow a similar narrative model.

Throughout the entire period under consideration, one can observe both such neutral or neutral-positive attitudes toward the sultan and sharply nega-

tive ones. This is especially clearly expressed in marginal notes. For example, Vladislav the Grammarian uses the formulation “the great and autocratic Muslim tsar emir Mehmed beg” (Bozhilov 1983: 113–114). At the same time, formulations such as: “under the impious Sultan Ebrahim and under the metropolitan of Tarnovo kir Gavriil” (1644) are also encountered (Hristova, Karadzova, Uzunova 2004: 160).

In the Damaskin collection story of the miracles of St. George the Victorious, due to the language modernization, “pashas” and “kadis” become subordinate to Emperor Diocletian, whom he gathers in a “divan” to discuss the persecutions against Christians (Demina 1971: 308), and St. George himself is called a “sipahi” (Demina 1971: 309). Although the narrative refers to distant times and terms such as “boyars” (Slavic) and “testir” (Greek) are used (Demina 1971: 308), this approximation to the realities of the 17th century inevitably evoked stable associations among listeners. Thus, drawing a parallel between the stories of Damaskin collections and Ottoman realities through the selection of stories and the introduction of Turkish words to explain events of the past, the authors in one way or another created the image of the sultan as the instigator of persecutions against Christians and martyrdoms of saints. The comparison of Ottoman rule with the times of Diocletian seems to have been a very naturally forming association. From a marginal note in a 16th-century Panegyric: “Oh, it seems to me that just as Christians suffered at that time, it was not even so in the time of Diocletian!” (Bozhilov 1983: 120). It should be noted that in another text of the Damaskin it is said that, in comparison with the pagan times of persecutions, “now, at this time, no one compels [people], for the sake of the faith of Christ, to undergo martyrdom” (Demina 1971: 111) and Christians need only strictly follow the commandments (Demina 1971: 111). A distinction is drawn between attempts to destroy Christianity in the past and the Turkish conquest, understood as divine punishment resulting from people’s sins. However, this boundary could become blurred in the perceptions of people who became witnesses to attempts by Muslims to force Christians to change their faith, such as the author of the aforementioned marginal note.

The image of the sultan depended on the context in which it existed. For example, “The Rila Tale” was written under the patronage of Mara Branković, the wife of Murad II (1421–1444, 1446–1451). This means that Vladislav the Grammarian had to present the sultan as a legitimate ruler (Nikolovska 2016: 78). At the same time, the complexity of the sultan’s image in “Life of Despot Stefan Lazarević” can be explained by the specific relations between the two rulers—Stefan Lazarević was the sultan’s vassal and son-in-law, and this relations had to be explained and justified. (Šuica, Ivanović 2019: 97). The authors of marginal notes could express a variety of opinions, depending on the subject and purpose of the note: they could neutrally record the year of a manuscript’s creation, complain about the consequences of wars, etc. (Nikolovska 2016: 79) In general, within the framework of “peaceful” times or the necessity of interact-

ing with the Ottoman authorities, he was recognized as the ruler of the (Balkan) lands, similar to the basileus (and within the framework of dual subjecthood). The image of the sultan also remained, at least, neutral and was separated from the perception of the Ottoman conquest in literature relating to the time of the consolidation of Ottoman power. As Christians observed the further expansion of the state of which they had become a part, they increasingly began to endow the sultan with negative features, rejoicing at his defeats and grieving when he prevailed over Christian armies. In addition, comparing their present with what Christians had already experienced in the past, the authors drew a more unambiguous connection between the sultan and the oppression of Christians in the Ottoman state.

The kadi

Particularly interesting is the image of the kadi—the judge in the Ottoman court, another prominent Muslim figure of authority in Christian texts. The image of the kadi functions as a borderland figure between the “Us” and the “Other” world. He is not villainized – on the contrary, in the lives of saints he is presented as a reasonable person, placed under pressure both from the Muslim crowd and from the Christian clergy. The image of the kadi, who disputes with witnesses and seeks justice, can be compared to that of Pilate at the trial of Jesus (Dinekov 1939: 103–106). He does not wish “to stain his hands” with such deeds and seeks a way to preserve peace and order—for example, he proposes that the martyrs renounce their faith only outwardly in order to save their lives. In the end, however, he yields to the pressure of the crowd. According to Matei the Grammarian, the judge was “very prudent and reasoned with a sharp mind” (Ivanova 1986: 363), however, the author nevertheless endows him with vices characteristic of hagiographical Muslims—such as, for example, pride and arrogance (Ivanova 1986: 364).

Although in earlier lives the authors did not favor the image of a benevolent judge, in the Balkan lives of the new martyrs it is much more widespread (Krstić 2011: 152). This image is typical for the lives of the new martyrs, while in other sources, such as “The Story of the Translation of the Relics of St. John of Rila”, the kadi is not given any characterization at all; he is mentioned merely as part of the legal process of the translation, even when Christians ask the kadi court to resolve their internal conflict over the relics (Ivanova 1986: 387). Overall, the kadi is not depicted as malicious but as part of an Ottoman system that Christians could strategically engage with to their advantage.

The image of a benevolent judge is not only a continuation of a more ancient hagiographic position, but also a demonstration of an understanding of social roles in the Ottoman state. The judge is the embodiment of social order and stability. He acts as a mediator between the center and the periphery and also maintains the balance of forces in the territory entrusted to him. Striving to prevent the execution of the saint, the kadis go further than their prototypes

in earlier hagiographic texts, in fact risking their careers, since cases are known when the Muslim community sought the removal of a judge, referring to his lack of orthodoxy (Krstić 2011: 152–153). It should be noted that the kadi in the lives of the new martyrs is not merely a person holding a high position, but a fully-fledged member of urban society who understands that there is no simple way out of the situation: the acquittal of a Christian would lead to even greater aggression and radicalization on the part of local Muslims, while an execution would create a new cult of a saint, in turn uniting and radicalizing the urban Christians.

Respected members of the Muslim community

Other Muslim figures of authority include respected members of the Muslim community. For example, when the crowd of Muslims wavered in its determination to execute St. Nicholas, one of them, a certain “accursed elder” (Ivanova 1986: 368), inspired the other Muslims to carry out what had been intended to the end. He is described as follows: “he was, together with the devil, the elder of this entire gathering and the instigator of all the evil deeds” (Ivanova 1986: 368), from which many Christians and churches suffered. According to Matei the Grammarian, he was also responsible for the torture of St. George and was considered “a great zealot and fighter for their faith” (Ivanova 1986: 369). R. Gradeva advances the following hypothesis: this “accursed elder” may have been connected with Bali Efendi, a Sofia Sufi. Bali Efendi died around 1551–1553, that is, shortly before the death of St. Nicholas (Boykov 2020: 322–323). As R. Gradeva concludes, the mentioned “elder” was hardly Bali Efendi himself, but may have been someone influenced by him (Gradeva 2000: 314–315). In the seventeenth century, the author of the “Book of Travels”, Evliya Çelebi, mentions the followers of Bali Efendi in the town of Štip, who “was recognized as competent to make decisions in that town” (Dimitrov 1972: 26), in the town of Samokov (Dimitrov 1972: 32) and in other towns. This testifies that even in the seventeenth century the influence of the Sofia dervish still remained significant, and the presence of one of his followers at the court in the mid-sixteenth century appears entirely possible.

In order to persuade St. George the New to change his faith, the Muslims send precisely a member of the ulema (a scholar). According to the Life, he was well read and skillful in speech. In hagiographic texts, Islamic teaching is often associated with the devil, and the ulema was sent to St. George by Muslims who were “incited by demons” (Ivanova 1986: 295). Pop Peyo demonstrates to the reader the spiritual poverty and corruption of the Muslim learned men: despite his learning and, probably, his high position in the city, he offers the saint values that the authors of the Lives classify as base and even sinful—glory and wealth (Ivanova 1986: 296). It is St. George who initiates the discussion of higher matters. Living in the house of Pop Peyo, who willingly shared his knowledge with him, he easily defeats the scholar in debate,

even though the latter was known among Muslims for his eloquence (Ivanova 1986: 295). After speaking with St. George, however, he left ashamed and forced to depart, not knowing what to say. The image of the ulema can be contrasted with the image of Pop Peyo himself, who actively participates in the story. St. George lived in his house, where the priest taught him writing, and the youth listened willingly (Ivanova 1986: 295). For Muslims, the ulema serves as a source of reliable knowledge about religion, similar to the parish priest for Christians (Todorova 1997: 77). The triumph of St. George over the ulema is not only evidence of the strength of his faith and wisdom, but also a victory of Pop Peyo over his Muslim “opponent” and, in a broader sense, a victory of Christianity over Islam, demonstrating the superiority of both the pastor and the flock under his guidance. Considering that sending the ulema was the first idea of the Muslims who sought to convert St. George to Islam, it can be assumed that the problem of agitation by Muslim intellectuals was highly relevant for the Christian community. Thus, Joasaph Bdinski writes that some Christians converted to Islam “through writings and cunning” (Grasheva 1982: 197), which may imply the preaching of religious figures such as mullahs or dervishes and the intellectual conversations of ulema, similar to that described in the Life of St. George, in which the ulema addressed him “with cunning words” (Ivanova 1986: 295).

Encounters with ordinary Muslims

Encounters with ordinary Muslims are put in the context of the inevitable co-existence of the two religious communities. For the authors, in order to preserve Christians from the influence of Islam, it was crucial to draw a bold line between the two communities by demonstrating the supremacy of Christianity and portraying Muslims as a threat (Gradeva 2001). In practice, however, this self-isolation was impossible. For example, in a note from 1544 (“Tetraevangelion”), after the usual formulations about the circumstances of its creation and wishes of good to the readers, it follows: “The accursed hodja annoyed me, often shouting from the mosque” (Hristova, Karadzhova, Uzunova 2004: 129). Obviously, “accursed” here is not in a religious sense, but in a purely everyday sense – it reflects everyday irritation rather than hatred. The works themselves acknowledge this inevitable coexistence. Among the clients of St. Nicholas and St. George there were Muslims (Ivanova 1986: 295–296), and St. Nicholas even attended a common feast with them. It was precisely at this feast that he was forcibly compelled to accept Islam (Ivanova 1986: 335–336)—a motif that emphasizes the danger of excessively close communication. The way Balkan hagiographic authors emphasize the consequences of close interaction is based not only on dogma or preaching canons. This was a very real problem. Court cases of the period under consideration record accusations against Christians based on the fact that, communicating with Muslims, they accepted Islam but then decided to renounce it (Gradeva 2000: 321).

In general, Y. Tzedopoulos identifies two stages in the development of Balkan new martyrdom in the 15th–17th centuries. The end of the 15th–beginning of the 16th century: martyrs were often representatives of the former Byzantine aristocracy and wealthy townspeople. Their executions reflected pressure aimed at the Islamization of the elites and the transfer of economic power to a new Muslim ruling class (Tzedopoulos 2022: 346). Mid-16th–17th century: the majority of the martyrs were poor craftsmen and migrants (bakers, tailors, shoemakers), who became victims of everyday conflicts, professional envy, or accidental accusations of blasphemy in a mixed urban environment (Tzedopoulos 2022: 359). The lives of the new martyrs describe diverse but realistic ways of falling under the influence of Islam in conditions of inevitable interaction with Muslims. Therefore, even interactions with Muslims as individuals are presented as part of collective interactions between Christians and Muslims. For example, when Muslims saw how talented and handsome St. George was, they thought: such a great person should become a Muslim (Ivanova 1986: 295). The benefits for the Muslim community were their top priority. When St. George refuses, this becomes an issue between two communities. Christian authors warned that communication with Muslims was dangerous; it could not be peaceful, because both sides were, first and foremost, representatives of their communities, and the goal of the Muslim community was to obtain “valuable” people from the Christian side.

The crowd of Muslims

In general, with regard to groups of Muslims, a number of negative epithets are used: “instigators of evil” (Ivanova 1986: 301), “unbelievers” (Ivanova 1986: 337), “wicked” (Ivanova 1986: 331). Such epithets can be called “religious” because they put a person on a scale between “Christian good” and “Christian evil” based on their belongness (or the lack of thereof) to Christianity. Comparisons with animals, based on folk stereotypes interconnected with Christian symbolism, form a separate category. Christians are associated with “harmless” animals, connected with positive stereotypes and symbols, for example, “Christ’s lambs” (Ivanova 1986: 336). Muslims are often compared to predatory, dangerous-to-humans animals. A generalized comparison with “wild beasts” is frequently found (Ivanova 1986: 335). Some descriptions are animalistic without direct comparisons to specific animals: “crying aloud and gnashing their teeth, they rushed at him” (Ivanova 1986: 335). The mockery of Muslims toward St. George is described as “as if wolves tear apart a lamb” (Ivanova 1986: 303). Studying the reflection of notions of good and evil in the Damaskin collections, V. Micheva highlighted the following real and mythical animals, described as “ferocious” to denote the anti-divine and dangerous – a category to which Christians also related Muslims: wolf, wild beast, lion, dragon, lamia (a snake-like water beast that lives near water and in caves (Demina 2012: 435; Micheva 2015: 73).

The image of an enraged crowd opposed to the judge is also found in earlier lives of saints. Although the actions may unfold in rural areas as well, the early Christian development of hagiographic literature was connected with cities. The stories of the first martyrs who suffered under Roman authority, the “martyria”, were recorded and disseminated primarily in an urban environment. In addition, Rome created an urban infrastructure of martyrdom: it adopted anti-Christian laws, appointed judges, and maintained the infrastructure and spaces (tribunals, prisons, and arenas) where the events unfolded. Even with the subsequent development of martyrdom, including in rural areas, cities remained a favorable environment for the appearance of martyrs (Maier, Urciuoli 2022: 171–172).

We will briefly compare the lives of the new martyrs in Sofia with the Martyrdom of St. Polycarp of Smyrna (between the 2nd and 4th centuries (dating: Moss 2010)), which is considered the earliest complete description of the process of martyrdom and established the Greek terminology of martyria, in order to demonstrate how the tropes and images of early Christian lives were adapted to Ottoman realities. The crowd of townspeople plays an important role in the story of St. Polycarp. His interrogation and martyrdom were a public spectacle in the stadium (Maier, Urciuoli 2022: 178). In the same way unfold the persecutions of St. George and St. Nicholas, with the difference that the Roman tradition of spectacular executions in the stadium had passed into the past. Instead, the main setting becomes the court, characteristic of the Ottoman system. Nevertheless, there is still a crowd of observers who expect a very definite outcome. Although the goal of both the Roman and the Ottoman persecutors is to destroy the Christian and prevent him from becoming a martyr, the saint proves the strength of his faith, and other Christians successfully save his relics, which lay the foundation for the veneration of the cult. As in the lives of the Balkan new martyrs (and a number of other hagiographic texts), the proconsul offers St. Polycarp a way out of the situation – to publicly acknowledge himself as a pagan. But before the eyes of the “entire crowd of lawless pagans”, he refuses. (Maier, Urciuoli 2022: 181) Against the bloodthirstiness of the pagan / Muslim crowd, even a well-founded appeal to the law does not help. Thus, in the life of Macarius of Chios (d. 1590), the kadi was ready to release him on the basis of a fatwa recognizing forced conversion as invalid, but the crowd accused the judge of betraying the faith (Krstić 2011: 151).

It may be concluded that although the imagery in the Balkan lives of the new martyrs relies on a rich Christian heritage, this does not make it artificially constructed or secondary. Both the image of the judge and the image of the crowd of non-believers observing the trial and wishing death to the saint are combined with Ottoman realities and hardly distort them beyond recognition. Muslim “witnesses to the case” (şuhud ül-hal) were a real element of judicial practice in the Ottoman court (Türkmenoğlu 2024). A crowd of Muslims is also encountered in the earlier texts we have considered. In “The Story of the Translation of the Relics of St. John of Rila to the Rila Monastery”, Christians are not afraid of the

authorities and interact with them humbly. However, in Sofia they feared that ordinary Muslims could do them harm “out of envy” (Ivanova 1986: 289).

“A Word of Praise of Philothea” adds more nuances to the problem of the threat from ordinary Muslims. Christians who converted to Islam, as expected, receive harsh treatment from the author. Such converts, motivated by fear, greed, or deceit, are promised eternal punishment as enemies (Grasheva 1982: 197). The influx of new converts also explains why Muslims were familiar with martyrdom. The Muslims’ pressure on St. Nicholas, asking him to join rituals or convert or divorce his wife (Ivanova 1986: 341–342), implies that new converts were under scrutiny and expected to prove themselves as faithful Muslims. Such expectations could make them act more zealously and rigidly, willing to be recognized by their new community. The zealous converts’ knowledge of Christianity could easily be spread among other Muslims and instrumentalized against Christians.

Unique individuals: crypto-admirers of Christianity

There are some individuals who stand out from the crowd, for example, the aforementioned “old man” or ulema. Considering their status, we classified them as people of authority. There is another interesting person who is highlighted and is more likely to represent the group of “ordinary Muslims”. Pop Peyo interacted with someone who is called a “Saracen”. He is described as someone “nicely dressed in Saracen clothing but having a great heart for the Christian faith; out of fear he did not dare to confess it” (Ivanova 1986: 304). Pop Peyo asked him to listen carefully to everything that happened to the saint during his execution (Ivanova 1986: 304). From the description of his appearance, we may assume that he was one of the well-off Muslims of Sofia. This man appears as a big sympathizer who did not dare to convert even secretly but still supports Christians. Although his image is positive and he “longs to be a Christian”, he is still called a “Saracen”, since he lacks the courage to declare himself openly. Within the system of strict division between Christians and Muslims that we observe in Christian works, such a helper had to possess some connection to Christianity. It should be noted that from a broader perspective, Balkan Orthodoxy is quite lenient and accommodating to crypto-Christians (Skendi 1967: 238–239). However, Pop Peyo’s position appears to be stricter than that general notion because he clearly regards the “Saracen” part of the Muslim community, and in the context of a martyrdom, his fear is opposed to St. George the New’s courage, who refused to accept the kadi’s offer to convert to Islam publicly and thereby become a crypto-Christian. Before openly rejecting Islam, St. Nicholas the New, essentially, lived as a crypto-Christian. It is hard to compare someone who willingly opened his heart to another religion (“the Saracen”) to someone who was forced to convert to Islam (St. Nicholas), however, it was exactly the demand to participate in Muslim rituals and act as a believing Muslim that made him revolt and declare his loyalty to Christianity. The role model set in Christian literature encourages crypto-Christians to openly ex-

press their allegiance without explicitly criticizing their choice to keep their faith in secret, justified by the circumstances.

Nevertheless, crypto-Christians or crypto-admirers of Christianity represent an interesting case of “borderline” figures. In this sense, he can be compared to the kadi whose morals are tainted by Islam, according to Christian authors, despite his conscience and humane attitude towards Christianity. Both of them cannot fully cross the border of acceptance by Christians because belonging to Islam is considered an inevitable moral failure. The authors expect from such Muslims the same courage of faith that is demonstrated by saints.

Conclusion

The sources analyzed in this article were primarily produced by members of the clergy. They reflect clerical perceptions and served as reminders of the existence of interreligious boundaries for ordinary Christians who actively interacted with Muslims and could even consider conversion. The sources examined in this article reflect a framework of double normality. The image of Ottoman authorities shows temporal development. The Ottoman conquest is interpreted as divine punishment, yet the authority of the sultan is accepted as a given and integrated into the familiar order of the world. By the late 15th century, Ottoman rule had become an established framework of life. Moreover, encounters with the kadi, whether detailed or procedural, are presented as interactions with a functioning judicial mechanism that Christians could address, negotiate with, and occasionally use to protect their interests, reflecting a trend toward normalization. While the image of the kadi and other figures of authority seem to be quite stable throughout the 15th–17th centuries, the image of the sultan wavered depending on the context with a tendency to acquire more negative traits in the later period.

Encounters with ordinary Muslims do not experience notable changes throughout the period under consideration. Inevitable coexistence is depicted as the main area of tension, pressure, and conflict. Despite the influence of earlier lives of martyrs, encounters with ordinary Muslims correspond to the Ottoman realities, depicting actual spiritual and physical threats that the Muslim community posed to Christians. These encounters are inter-communal, with Muslims usually depicted as a crowd of people. However, some prominent individuals stood out from that crowd, such as their leaders (for example, the supposed dervish described by Matei the Grammarian) or secret helpers of Christians.

The image of the kadi in the lives of the new martyrs and the image of a crypto-admirer of Christianity or a crypto-Christian present an interesting case of “borderline” figures. Despite their openness to Christianity and disagreement with the Muslim majority, they are not considered “positive” characters because relation to Islam, inward (the kadi) or outward (if the “Saracen” was more than just a sympathizer), according to Christian authors, inevitably taints their morals.

Thus, political life under Ottoman rule becomes a familiar, navigable environment, while social coexistence with the Muslim majority remains a source

of anxiety and conflict. This contrast is not paradoxical. This framework of double normality reflects the strategy by which Christian communities maintained their identity: adapting to the institutions of the state, yet resisting the forms of closeness and integration that might erode communal distinctions and lead to increased Islamization.

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The Malediction of the 318 Fathers in Slavic-language Manuscripts from the 16th–18th Centuries

Abstract: Manuscript books are valuable not only because of their monetary value, but also because the creation of a book is a God-pleasing deed. In the period after the fall of the Balkans under Ottoman rule, donors increasingly donated liturgical books to a church or a monastery so that they would serve for the salvation of their souls and those of their families. In the notes on the bestowal of the book, anyone who dares to remove or damage it is threatened with a terrible malediction. Most often, the incantation formula mentions the 318 holy fathers of Nicaea, that is, the participants in the First Ecumenical Council, held in Nicaea in 325. Similar texts are found in Bulgarian, Serbian, South Slavic, and Vlach-Moldovan manuscripts, especially in the 16th–17th centuries. We find them in the scribe's main notes, when the donor ordered and paid for the creation of the manuscript, or in secondary inscriptions in cases where the donor bought the book specifically to use it in the church. The earlier inscriptions follow the Byzantine model and mention Arius, because of whose heresy the council was convened. In the later texts, his name is not included, probably because early Christian dogmatic disputes are no longer relevant for the scholars. Instead, the help of the saint whose name the church to which the book was donated bears is invoked. The authority of the 318 fathers is preserved, and the old incantations prove to be a way of emphasizing one's own identity at a time when Orthodox Christians are under the rule of non-Christians. This is also the reason why the same curses appear in books created in different ethnic environments.

Keywords: *manuscripts; donation; maledictions; First Ecumenical Council; 318 fathers of Nicaea*

Introduction

The Word comes from God, therefore the creation of a book is a divinely pleasing work. Medieval literature follows the Old and New Testaments as models, which are sacred and are the highest in the literary hierarchy. Writers are guided by them both for the style and for the images they build. Particularly important for the medieval text are the *topoi* (Miltenova 2003: 514–515), as well as the references to the biblical books, which allow the images to be interpreted both literally and symbolically. Even in chronicle works, when telling about a specific event or person, the narrative comes as close as possible to the biblical prototype. Medieval literature is perceived as a “kerygma” – it is perceived as

the dissemination of the word of God. A large part of Slavic manuscripts are directly related to Christian worship. The book has a specific application, and no one doubts the authenticity of the written word (Angusheva 2008: 17–19).

Creation of a manuscript is a lengthy process that requires special skills. The scribe does not simply transcribe a given story. He is often also a translator, shaping the text according to a certain verbal style; he outlines, oversaw and binds the codex itself, decorates it. He compares information from more than one source when there is an inaccuracy in them; it is necessary to be competent in the subject he is writing about in order to be able to leave explanations for the readers. Even when the writer does not have to do all this to create a manuscript, his work requires patience, perseverance and knowledge. That is why he proudly calls himself a “Grammarian”. Being a scribe is a profession. It is accepted that after the fall of the Balkans under Ottoman rule, the profanation of an elite literary culture began, but the efforts of the scribes did not decrease, and their work was highly valued, as evidenced by the many literary schools.

The book is an expensive item (Ivanova 2002: 27–44). Parchment is difficult to process and has a high value. About 400 sheepskins are needed to produce one larger manuscript. Books are expensive, and the work of a writer is no less expensive. The introduction of paper facilitates the process of creating manuscripts. The difficulty comes from the fact that paper is not produced in the Balkan countries and is most often imported from the Italian lands. Thus, the high monetary value of books is preserved. In addition, the writer, besides knowledge and special skills, must have a strong faith in order to have the patience to complete his difficult work. A manuscript is a valuable thing that should serve God, glorifying His word, as well as the people it will reach (Georgieva 2001: 102–103). In their desire to preserve the book, scribes often leave incantations in it that threaten with severe punishment anyone who allows themselves to damage their valuable work.

Often, liturgical books, mainly *Gospels* and *Apostles*, are donated to a monastery or temple. The ktetor who makes the donation wants it to serve for the salvation of his soul, the souls of his parents and children. Sometimes it is noted that the descendants of the donator have rights over the manuscript, but it is emphasized that even they cannot take it away from the temple in which it is attached. The donated book is doubly valuable, because it must ensure the well-being of the family and the immortality of souls.

The Malediction of the 318 Fathers

In a number of Slavic-language manuscripts, in notices attesting to their donation, a terrible malediction was left – if anyone dared to remove, sell or damage the book, they would be cursed by the 318 holy fathers of Nicaea. These were the participants in the First Ecumenical Council, held in Nicaea in 325 (Kuev 1970–1972: 314–321). It was convened by the Byzantine emperor Constantine I the Great (324–337) because of the heresy of Arius, the so-called Arianism,

according to which Jesus was not of the same essence as God the Father. The doctrine of Arius was condemned, the one essence was affirmed. The Symbol of Faith was also approved at the same council. Evidence of the great importance of the council is the fact that the memory of its participants is celebrated on a special holiday, on the seventh Sunday after Easter. A wealth of preaching literature has also been created in connection with the holiday. Different sources give varied information about the number of participants, and the figure varies significantly, probably because there were several numbers of delegates at different sessions. Even Athanasius of Alexandria mentions 300 people in some cases, and 318 in others. Gradually, the opinion that there were 318 of them became established, and they began to call the Council of Nicaea the Council of the 318 Fathers. Probably the reason for the affirmation of this number is the coincidence with the 318 servants of Abraham, with whom he went to war. Probably also important is the mystical meaning of the Greek letters used to write the number—τη—which unite the sign of the Holy Cross with the name of Jesus. The Fathers of Nicaea became an example to follow. That is why curses appeared for their name (Kuev 1986: 373–375), found in various Slavic manuscripts from the 14th–15th centuries. In the 16th and 17th centuries, the curse was more widespread, and almost all inscriptions for the use of a book in a church or monastery ended with it.

The malediction is also found in official documents. It is included in the Virgino Charter issued by the Bulgarian Tsar Constantine Tih (1257–1277) to the Virgino Monastery of St. George the Swift, which is kept in the Library of the Hilendar Monastery under the signature A 23/12. If anyone disobeyed the ruler's order, he would be “cursed twice and triple by the Lord God Almighty and by His [pure] Mother, and by the power of the honorable and life-giving Cross, and by the four evangelists, by the 12 apostles, and by the 318 Nicene Fathers.”¹ A similar curse is included in the Vitosha Charter of Tsar Ivan Shishman (1371–1393). It is a deed of donation for the Dragalevtzi Monastery of the Holy Mother of God of Vitosha, issued in the period before 1382. Today it is kept in the Library of the Zograf Monastery on Mount Athos under No. B IV BZ4 (Pavlikianov 2016: 81–82). In it, anyone who would dare to violate the king's order is threatened “to be cursed by the Father and the Son and the Holy Spirit and by the Most Pure Mother of God, and by the 12 apostles and the 318 holy and God-bearing Nicene Fathers and to be made a partaker with Judas and Arius.”²

¹ Проклѣ и трыклѣ ѿ г҃а б҃а вседръжит[ел] и ѿ [прѣчѣстоу] егѡ мѣ[ре] и силоу ч҃тнаго и животворацѣго кр҃ста. и ѿ четои[рехъ] еванг[елистѣ] ѿ б҃и аплз и ѿ т[нѣ] ѿць ноикѣи [Proklet i tryklet ot g҃a b҃a vse-drzhit[el] i ot [pryechystoya] ego mѣ[re] i siloya chstnago i zhivtvoryashtago krsta. i ot chetoi[reh] evang[elist] ot v҃i apstla i ot t[ni] otts noikey] (Daskalova, Raykova 2005: 35–36).

² Да е проклѣтъ ѿ ѿца и с҃на и с҃го дх҃а и ѿ прѣчистѣ вѣомѣре и ѿ .б҃и. аплз и ѿ .тнѣ. стѣ и вѣоноснѣ ѿтѣцъ Никенскѣи сз Иѡдж и Ариа участие да иматъ [Da e proklyet ot o҃tsa i s҃na i s҃go dh҃a i ot pryachistya bgōmfere i ot .v҃i. apstla i ot .tnѣ. styh i bgōnosnyh o҃tsa Nikeiskih i sa Iudya i Ariya uchastyastie da imat] (Daskalova, Raykova 2005: 47).

The curses that appear in Bulgarian documents follow the Byzantine models (Irechek 1978: 447). Similar phrases are also found in ktetor inscriptions, again their prototype being Byzantine epigraphic texts (Smyadovski 1991: 45). The Shkorpil brothers describe a Greek text from 1342, inscribed on the frame of an icon of the Virgin Mary from Nessebar, which also includes a curse from the 318 holy fathers (Shkorpil, Shkorpil 1891: 106).

The invocation of the Fathers of Nicaea is often found in spells and prayers, sometimes together with the name of the Virgin Mary. They are a kind of protection against the enemies of Christianity. Apocryphal prayers are known in which, on behalf of the 318 Fathers of Nicaea, protection against various troubles is sought. For example: “I adjure you, devil, by the 318 holy Fathers who were gathered in Nicaea, that you have no power over Christian work”; or: “I adjure you, winds and whirlwinds and fires, by the 318 Fathers who are in Nicaea, that you do not do any mischief” (Petkanova 1994: 60–61). In spells, Christians invoke the Holy Cross, the Virgin Mary, the four evangelists, and the 318 fathers of Nicaea as protectors, who have the greatest power (Angelov 1979: 7; Angelov 1985: 146).

The Malediction in the manuscripts

Logically, similar threats also appear in manuscript books, most often in notes about the writing or application of a manuscript in a temple or monastery. This type of note is often similar. It states who bought the book or paid for its writing; what its price was; to whom the manuscript was given as a gift. The purpose of the donation is indicated—most often to serve for the salvation of the ktetor’s soul. The expression „to minister to his soul“ means that the priest will mention in his prayers the names of the donator, his wife, his parents, his children, as well as other relatives, if their names are given. At the end of the note is written the malediction. It is a stable formula and has been repeated almost unchanged for centuries (Ruseva 1921: 14).

The earliest preserved Bulgarian-origin note of the type of the scribe’s main note is from 1547 in a Collection No. 33.16.12 in the Library of the Russian Academy of Sciences (Hristova, Karadzhova, Uzunova 2004: 12). The name of the scribe is not preserved, but it is noted that the book was written by order of the Ohrid Archbishop Prohor (1528–1550) for the Great Church of Justiniana Prima. If anyone dares to take the book from the church, he will be cursed “by the Lord God Almighty and by the Most Pure Mother of God, and by the 318 holy fathers of Nicaea, and by all the saints.”³

It is curious that the next preserved note containing the incantation formula dates back to 1595, and the text is not typical and deserves special attention. It is found in Octoechos (liturgy) No 207 in the Church Historical and Archae-

³ ѿ г҃а б҃а вѣсѣдрѣжитѣлѣа, и ѿ прѣсѣѣте б҃гѣмѣтере и ѿ тѣх сѣѣ ѿцѣ нже вѣ Никѣи, и ѿ вѣсѣхъ сѣѣ . [ot g’a b’a vasedrazhitel’a, i ot pryachstie bgom’tere i zht Tih st’yh o’tsa izhe va Nikyei, i ot vaseha st’yh.]

ological Institute in Sofia (Hristova, Karadzhova, Uzunova 2004: 25) and was written by hieromonk Mitrofan with the payment of the monk Dionysius, who donated it to the Kapinovo Monastery. It says the following:

If anyone is tempted to take this book from the holy monastery or sell it, let him be cursed by the Lord God Almighty and by the 318 holy fathers of Nicaea and let him have the fate of those who said about Christ: “Take and crucify him”, and by all of us.⁴

Among the secondary inscriptions there are also those with an earlier date. The Museum of the Renaissance in the town of Elena keeps an old-printed *Psalter*, published by Vincenzo Vukovich (?-1566). It has a preserved inscription from 1518, which reads as follows:

Let it be known that this book, called the Psalter, how did Pero apply it in the church “St. Nicholas” to work for his soul, for his wife Gaganka, for his father Nikola, for his mother Doycha, with the clergyman Symon, priest Varban, elder Mirko, Petko Kokin and Veli from Vranjak. Pero bought it for 552 aspri (agrent coins). And whoever is tempted to take it out of the church “St. Nicholas”, let him be cursed by the 318 fathers. Amen.⁵

Later, the book ended up in the personal library of Doyno Grammatik (around 1760 – after 1814), author of the so-called Elena Transcript of the *Istoriya Slavyanobolgarskaya* (the Slav-Bulgarian History).

In the *Four Gospels* of 1595, National Library St. Cyril and Methodius in Sofia, No. 876, a secondary note is preserved, from which it becomes clear that the book was purchased by Georgi and his wife Dena for the salvation of their souls, those of their parents and children (Stoyanov, Kodov 1964: 48–49). The postscript ends with a curse: „if anyone dares to appropriate or sell it, let him be cursed by the 318 holy fathers of Nicaea, and let St. Nicholas be his rival at the Last Judgment.⁶

⁴ Да аще кто покoусит се взети сѣю книгоу ѿ сѣѣи монѣти, или продаѣти ю. сицевымъ да еѣ проклѣ ѿ гѣ бѣ възсѣдрѣжитѣля и ѿ тѣи сѣѣи ѿци иже въ Никѣи и да имѣѣ оучѣстѣе съ ѿнѣмъ иже рѣше на хѣ. възми распанѣи его. и ѿ възсѣѣ на. [da ashte kto pokousit se vazeti siyu knigou ot sfyi monastir, ili prodati yu. sitsevyi da es proklet ot gѣ bѣ vasedrazhitelya i ot tѣi sfyi otsi izhe va Nikei i da imat ouchestie sa onyami izhe ryashe na hѣ. vazmi raspani ego. i ot vasyah nas]

⁵ Да се знае сѣю книга глими фалтирь како прѣложи ю Пѣра храмѣ сѣѣго ѿца Николи да работи за неина дшѣѣ подрѣжие Гаганка за ѿца Никола матѣрѣ Доиѣа мартерѣна дѣѣховникѣ Сѣмонѣ попѣ Вѣрѣвань старѣшина Мирко Петко Кокѣинѣ и Вѣли ѿ Вѣранѣкъ на кою кѣѣпи Пѣра фнѣ гапрѣ кои се пѣѣси да га изнесе истого ѿца Николи да е проклѣтъ ѿ тѣѣ нѣѣ ѿѣѣ аминѣ. [Da se znae siyu kniga glimi psaltir kako prilozhi yu Pera hrama sfgo otsa Nikoli da raboti za neina dshѣѣ подрѣжие Gaganka za otsa Nikola matr Doicha marterna duhovnik Simon pop Vraban stareshina Mirko Petko Kokin i Veli ot Vranak na koyu kupi Pera fni gapri koi se pusi da ga iznese istogo otsa Nikoli da e proklet ot tѣѣ nѣѣ otsy amin.] (Popgeorgiev 1904: 97–98; Nachev, Fermannzhiev 1984: 62).

⁶ „И кто ицѣѣ покѣѣси да ю присвоитѣ или да ю продаѣѣ да е проклѣѣ ѿ тѣѣѣ сѣѣи ѿѣѣи еѣ въ никѣ... и

In the 16th and the 17th centuries, donation inscriptions appeared in which the curse was absent. We find such an example in the Liturgy of 1578, No. 6 in the Library of the Metropolis in Vratsa. The manuscript has a preserved inscription that reads: “This divine liturgy was bought by Tsotso from Glavanovtsi and applied to the temple of the holy hierarch and miracle worker of Christ—Nicholas, to serve for his soul and that of his parents.”⁷

In the 18th century, the incantation formula was rather an exception. An interesting example is a note in the so-called First Kotel Copy of the the *Istoriya Slavyanobolgarskaya* (the Slav-Bulgarian History), No 368 in the National Library in Sofia, made in 1765 by priest Stoyko Vladislavov (Sophronius of Vratsa) (1739–1813). It was copied from the manuscript of Paisius of Hilendar (1722–1773), and the epitrop Christo donated it to the church of „St. Peter and Paul“. Sophronius wrote the following: „And whoever appropriates or steals it, let him be aphorized and cursed by the Lord God of Sabaoth and by the 12 apostles and by the 318 fathers of the four evangelists. And let sulfur, and iron, and stone melt, but not him, forever.”⁸ In the 19th century, no notes containing a malediction on behalf of the 318 fathers were found. In this period, inscriptions reporting the donation of the manuscript to a temple or monastery were also rare (Ruseva 1921: 14).

Similar annotations are frequently found in Russian, Serbian, and Romanian manuscripts from the 16th–18th centuries, both in main notes and in secondary annotations.

In the *Apostol* of 1519, Library of the Romanian Academy No 202, written in the city of Craiova, Romania, there is a main note by the scribe, which states the name of the scribe Dragomir, the year of writing the book, and that it was written by order of the Župan Preda. Immediately after it, another note reports that the same Župan Preda attached the book to the Bistrica Monastery and requested that a curse be written, according to which:

if anyone is tempted to transfer it to another place from this holy temple,
a monk or a grammarian or a simple person, let him be cursed by the 318
fathers of Nicaea, let him be in communion with Judas and Arius and many

да мѡ ѿсѣперниѣ стѣы нѣколаѣ на страшно сѣднице“ [I kto ishtet pokusit da yu prisvoit ili da yu prodadet da e proklet ot tñi stī otts’i ezh v nīke... i da mu yes supernik stŷy nikolae na strashno sudishte].

⁷ Коупи сѣю вѣжвѣнѣ лѣргѣю, Цоца, ѿ Главановци. и приложѣ ю, въ хрѣ стѣго архіереа. и чюдотворца хѣа Николѣа да слоужи за неговѣ дшѣ и за родителевѣ [Kupi siyu bzhstvnu litrgiŷy, Tsotsa, ot Glavanovtsi. i prilozhi yu, va hram stŷgo arhierea. i chyudotvortsa hvā Nikolae da slouzhi za negovu dsh’u i za roditelevu] (Hristova, Karadzhova, Uzunova 2004: 22–23).

⁸ И кої ѡдъ свои или ѿкрадне да ѣ афоресан и проклетъ ѿ гѣ бѣ Саваода и ѿ ВІ апѣли, и ѿ ТИИ ѿцѣи и ѿ четири еѿлисти, и тѣѣ и желѣзо и камик да се стѣпи тои ни въ вѣки [I koī ya usvoi ili otkradne da e aforesan i proklet ot ga’ba’ Savaota i ot VI apsli, i ot TII ots’i i ot chetiri englisti, i tuch i zhelyazo i kamik da se stupi toi ni va vyaki] (Hristova, Karadzhova, Uzunova 2004: 85–86).

others who spoke untruths about God, and let St. Nicholas be his opponent at the Last Judgment.⁹

In South-Slavonic manuscripts, maledictions also appear in the name of the 318 fathers of Nicaea. We find such a thing, for example, in the *Four Gospels*, Russin State Library – Moscow, coll. 256, No. 131, written in the city of Dubna by the monk Arseny no earlier than 1539 (Vostokov 1842: 188–190). In it, anyone who dares to take the book is threatened with „anathema and an oath from the holy 318 fathers of Nicaea.”¹⁰

It is noteworthy that in Serbian manuscripts such curses are less common, but they follow the same pattern. Among the earliest dated inscriptions is the one in the *Gospel* of 1562, State Historical Museum – Moscow, Hludov collection No. 170: “...and whoever takes it from St. Demetrius, let him be cursed by the 318 holy fathers in Nicaea and let him be his rival at the Last Judgment, St. Demetrius”¹¹ (Stojanovich 1923: 63). Similar in content is a note in a manuscript from the Zograf Monastery from 1564: “If anyone appropriates this book, let St. George be his opponent at the Last Judgment, and let him be cursed by the 4 evangelists and the 12 apostles and the 318 holy fathers”¹² (Stojanovich 1923: 64).

It is noticeable that the incantation formula changes. In the earlier texts Arius and Judas are mentioned, but gradually their names disappear. It seems that it is forgotten that the Council of Nicaea was convened precisely against the heresy of the Arians. The 318 fathers are revered on a par with the apostles and evangelists, probably because they were the first participants in an Ecumenical Council. From the standpoint of the years, it is no longer important exactly what heresy they fought against. The early Christian religious disputes have lost their significance, but the authority of these first defenders of the faith remains.

There are cases in which several successive owners of a book leave the same curse. This is the case with the *Four Gospels* from the first half of the 17th

⁹ Понеже кога се покоусит да го принесе на ино мѣсто ѿ сѣю свати Храм или колоугеръ или гра[м]атик ли просто чловѣкъ, да ест проклет ѿ тнѣ ѿцы иже въ Никен и да ест причестенъ съ Юдою и съ Арїа и съ ини многози цю рыпташе и рекоше на Бога неправдѣ и да се прет на страшнии сѣдѣ със сватомѣ Николи. [Ponezhe koga se pokousit da go prinese na ino myasto ot sĭyu svyati Hram ili koloug- era ili gra[m]atik li prosto chlovyak, da est proklet ot tnĭ ottsi izhe va Nikei i da est prichestena sa Yudoyu i sa Arĭa i sa ini mnogozi shto ryptashe i rekoshe na Boga nepravdu i da se pret na strashnii sudy sas svatomu Nikoli.] (Panaitescu 1959: 296–297).

¹⁰ „Анафема и маранафа еже естъ клятва етъ ѿць тѣ и нѣ иже въ Никен.” [Anafema i maranafa ezhe est klyatva stŭh otŭsy tĭ i nĭ izhe va Nikei.]

¹¹ и кто ю ће внимить ѿ светаго Дмитріа да не[с]тъ проклетъ ѿ .т.н.ї. светых ѿць иже въ Никен и да мѣ е съпръникъ на страшнемъ сѣдѣ светы Дмитріе. [i kto yu che oimity ot svetago Dmitriā da yes[t] proklet ot .t.n.ĭ. svetyh ottsy izhe va Nikei i da mu e saprnika na strashnem sudu svety Dmitriē.]

¹² да аще ли кто посвоит сѣю книгѣ и ѿелви, да мѣ ест съпротивник свети Гевргіе на страшнемъ сѣдѣ, и да ест проклетъ ѿ .д. еваггелїити и .б.ї. апостоли и .т.н.ї. светых ѿць [da ashte li kto posvoit sĭyu knigu i pseloi, da mu est saprotivnik sveti Georgiē na strashnem sudu, i da est proklet ot .d. enaggeliiti i .v.ї. apostoli i .t.n.ĭ. svetyh ottsy]

century, written in Moldova, No. 15 in the Library of the Romanian Academy (Panaiteescu 1959: 23–24). Father Dumitru and his wife Gafta donated the manuscript to the Săcul (Neamț) Monastery. According to the inscription left, “if anyone is tempted to sell it, let him be cursed twice and triple by the Lord God, who made heaven and earth, and by his pure mother, and by the 318 fathers of Nicaea, and by all the saints pleasing to God.”¹³ Later, another priest, Father Ion from the village of Tuzara in the Bessarabia region, bought the book to donate it to the church of the Assumption of the Virgin Mary. He left an anathema to anyone who dared to sell the manuscript, even if it was one of his children and grandchildren, “let him be cursed by the 318 fathers of Nicaea”¹⁴.

Sometimes the protection of the 318 Fathers of Nicaea is resorted to on other occasions. Of interest is a postscript in the *Gospel* from the Dečani Monastery from 1565, which states the following:

In the year 7073, then Sultan Suleiman (Suleiman I the Magnificent, 1520–1566) ruled, the month of May, second day. Let it be known how Raycho agreed with hieromonk Nestor and the brothers about the meadow above Glodzhan (a village near the Monastery). The elder bought it for the brothers from Behrama for 1060 and they gave Raycho three shares for 50 aspri (agrent coins). And from the Dečani monastery, hieromonk Sava and priest Grigory, and elder Athanasius, and elder Makarie, and priest Jacob from the Ilovite cells, and kir Zhivko from Ryazin, and kir Doychin from Tserven breg, and kir Rayo from Pecs. Elder Nestor and the brothers separated these three shares with a mark: cleary and Kriva reka, on one side Hasan’s meadow, on the second side the Zhivko’s pillar, on the fourth side Belays meadow; the border shall not change while Raycho and his sons are here, and if anyone covets anything from Belays or from Raycho or his family, let them be cursed by the 318 holy fathers and by the most pure Mother of God, and by us, the sinners, amen.¹⁵

¹³ „А кто съ пѣкѹситъ продатѣ а, а он да ест трекулѣт и прокулѣт ѿ Господа Бога иже сътворѣшаго небо и земли и прѣвѣстѣжа матир и тиѣ ѿцы иже въ Никіе и ѿ всѣхъ свѣтихъ Богѣмъ згодѣшихъ.“ [A kto sya pukusit prodati ya, a on da est treklat i proklat ot Gospoda Boga izhe satvyrshago nebo i zemli i pryachistiaya matir i tiŭ otŭtsa izhe va Nikie i ot vsyah svyatih Bogu ugodshih]

¹⁴ Да бѣдетъ прокулѣт ѿ тиѣ ѿцы иже въ Никен [da biadet proklyat ot tiŭ otts izhe v Nikei]

¹⁵ Въ лето 7073 тисѣщно и .б. и .г. тогда овладающѣмъ салтанъ Сѣлѣиманѣмъ мѣсеца маѣа .б. днь. Да се зна како се зродѣ Рачѣ Несторомъ иеромонахомъ и з братѣми за ливадѣ виши Глофанъ. Кѣпи старѣцъ братѣми ѿ Бѣхрама за хѣладѣ и .б. сътъ и дадоше Рачѣмъ г. деѣ за пѣ-цѣтъ аспри. И погодѣ ихъ ѿ манастира ѿ Дечанъ Сѣва иеромонахъ и поп Григорѣ и старѣцъ Атанасіе и старѣцъ Макаріе и поп Іѣаковъ ѿ Нілове келие и кир Живко ѿ Рѣзини, и кир Дончинъ ѿ Црѣвѣнога Брега и кир Раѣ ѿ Пекѣнѣ. ѿцѣпи старѣцъ Несторъ и братѣа ѿдѣ ѡнеи ливаде .г. деѣ, велега: іасен и Крива Река, съ едне стране Хасанова ливада. с двѣ стране Живковъ стѣп. и четръте стране Беладиска ливада; стѣп докле Рачѣ и неговѣи сыновѣи да се не помери, и тко а се потворитѣ или ѿ Беладѣи или ѿ Рачѣа или ѿ негова племена, да есъ прокулѣтъ ѿ .г. и .г. свѣтихъ ѿцы и ѿ прѣчѣсте богородице и ѿ нашега грѣшѣнства, амин. [V leto 7073 tisushtno i .b. i .g. togda obladayushu sultan Suleimanu myasetsa maia .b. dan. Da

It is possible that the Nicaean Fathers were called to help because the land belonged to a monastery. However, it is curious how their role changed. From protectors of the soul and guardians of the book, they became guarantors of a property deal.

Conclusion

The malediction of the 318 fathers appears in the Byzantine written tradition and from there it spread to the Bulgarian, Serbian, Romanian and Russian. While the Eastern Romans call upon them as advocates of the ruler's will, the other Slavs expect them to protect their souls. This is understandable, considering that the Byzantine prototypes were created at a different time. The Balkan writers write in a period when their lands are under the rule of people of different faiths; the old incantation formulas prove to be a link to the past, but also a way to emphasize their own identity. They are Christians and therefore deserve the protection of the first Fathers of the Church. This is also the reason why the same phrase is found in manuscripts created in different ethnic environments. Gradually, the role of the curse is profaned and changes, but it remains as the most terrible threat. Another question is to what extent it was observed. There are cases in which a manuscript was sold and donated several times, and each ktetor left a note stating that the book would serve his soul. Today, the majority of these valuable books are kept in libraries, having long since been removed from the places to which they were donated. But they have survived – even now, when the old churches and monasteries no longer exist. Perhaps this happened thanks to the protection of the 318 holy fathers of Nicaea; the medieval charm allowed the books to be preserved, and today we know the names of their founders.

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se zna kako se urodi Raich Nestorom yeromonahom i z bratiami za livadu vishi Glodzhnan. Kupi starts bratiami ot Behrama za hiladu i .s. sat i dadoshe Raichu g' deo za pe-tsats aspri. I pogodi iha ot manastira ot Dechany Sava ieromonah i pop Grigorī i starts Atanasie i starts Makarie i pop Iyakov ot Nilove keliye i kir Zhivko ot Ryazini, i kir Doichin ot Tsryvenoga Brega i kir Raya ot Pek[i]. Ottsepi starts Nestor i bratia otd onei livade .g. deo, belega: yasen i Kriva Reka, s edne strane Hasanova livada. s dva strane Zhivkov stup. i chetryte strane Belaiska livada; stup dokle Raich i negovi synovi da se ne pomeri, i tko ya se potvoriti ili ot Belaits ili ot Raicha ili ot negova plemena, da es proklet ot .f.n.i- svetih otts i ot prechiste bogoroditse i ot nashega greshnstva, amin.] (Stojanovich 1923: 64).

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The Alms-Collector's Progress. Alternatively, Why Should We Care about the Travails of Two Holy Men Travelling between Balkan and Ukrainian Lands in the Mid-18th century?¹

Abstract: This article examines Orthodox alms-collection in the mid-eighteenth century through the strategies of two Athonite monks, Anatolios Meles of St Paul's Monastery and Archimandrite Cosmas of the Great Lavra. Moving between the Balkans, Ukraine, and the Russian Empire, these travelling Holy Men operated within networks that connected monastic finance, pilgrimage, charity, commerce, and imperial power. The article argues that alms-collection should not be understood merely as fundraising, but as a religious practice shaped by the ideals of *Eleemosyne*, Salvation, and sacred exchange. Drawing on concepts of symbolic and social capital, it explores how relics, narratives of sanctity, personal reputation, and trans-imperial networks enabled the conversion of spiritual authority into material support. The contrasting fortunes of Anatolios, who achieved influence and advancement, and Cosmas, whose mission ended in disgrace and repentance, reveal the tensions between holiness, entrepreneurship and institutional control.

Keywords: *Alms-collection, Eleemosyne, Trans-imperial networks, Holy Man, Anatolios Meles of St. Paul Monastery, Archimandrite Cosmas of the Great Lavra, Ottoman Empire, Mount Athos, Ukraine, Russian Empire*

They are like merchants come to make a profit: their asking price is high.
But they also have a lot to offer in return (Tokarczyk 2021: 598).

A man there was, though some did count him mad, the more he cast away
the more he had (allusion to Proverbs 11:24).²

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² This and other un-ascribed allusions in the current essay are to the unabridged work of John Bunyan, *The Pilgrim's Progress*.

Introduction

Pilgrimage is, above all, a journey. As in Guillaume de Deguileville's fourteenth century *Le Pèlerinage de la Vie Humaine*, John Bunyan's *The Pilgrim's Progress*, or the anonymous nineteenth-century Russian *Pilgrim's Way*, the pilgrim's road is the physical space in which alms-collecting can be enacted. But the journey is also narrated as an allegory for spiritual advancement. The writing up of hardships and of distant destinations speaks to the search for meaning. The pilgrim's journey through the world thus becomes a personal and cosmic story culminating on the Cross.

At the centre of this narrative is the travelling Holy Man (or in a very few cases Holy Woman), in the guise, in our case, of the alms-collector or alms-gatherer, serving as an emissary for some monastic institution.³ Within the traditional framework of *Eleemosyne*, translated as both Mercy and alms-collecting or alms-giving, the Holy Man would have been understood as part of a system governed by spiritual obligation. Where lay people offered generosity, the Holy Man could devote himself to prayer, sacrament and preaching. What is given is not merely transferred in an economic sense but altered by the giver and the receiver's self-giving. In this understanding, money does not simply contribute to material improvement but becomes a means through which Divine Mercy is approached.

The list of travelling Holy Men who travelled from the Ottoman Empire to Ukraine, the Caucases and deep into the Russian Empire during the seventeenth and eighteenth centuries in search of alms is long. Licences for alms-collection in villages and towns were often granted for the Metropolitanate of Kyiv and other southern Dioceses. Permission was often requested to gather alms specifically in the Dioceses of Kyiv and Pereiaslav, as well as in Belgorod, Voronezh, and Smolensk, but not in the Empire's more distant interior regions.⁴

The present study focuses on two such travellers active during the 1750s, the first being Anatolios (Anatolii) Meles of the Saint Paul or Xeropotamou (often termed Sts. Paul and George or Sts. Peter and Paul in the relevant descriptions of the time) Monastery on the Holy Mountain, a tenth century edifice nestled among chestnut forests on the steep western side of the peninsular (Kotzageorgis 2002). And Archimandrite Cosmas of the Great Lavra, the Holy Mountain's oldest, highest-ranking Monastery, with its fortified complex, clustered stone buildings, towers, and domed Katholikon, surrounded by verdant slopes descending to the shoreline.

Recent scholarship on Charity and intellectual exchange between the Ottoman and Russian Empires is extensive. Among contributions is the work of Eleni Angelomati-Tsountgaraki, who argues that the authorised solicitation of

³ For comparative perspective, see the works of Peter Brown (Brown 1971: 80–101). For Rachel, a Holy Woman from the region of Trabzon (Trapezounta) and her journey to Kyiv during exactly this period, see TsDIAK [Central State Historical Archive of Ukraine, Kyiv], f. [fond or archival unit] 127, op. 127, op. [opis', opys or inventory] 1020, item [delo, sprava] 2085, 1–9.

⁴ For an example, see TsDIAK, f. 127, op. 1020, item 2879, 6–6v. [oborot, zborot or verso].

donations (also known as *zeteia*, from the Greek word meaning ‘to ask for’) in the post-Byzantine Orthodox world was not an informal or marginal practice, but rather a structured, quasi-institutional system of ecclesiastical finance (Angelomati-Tsougaraki 2007: 247–293). Kriton Chryssochoidis has argued that such alms-collection by monks travelling northwards centred upon grants from the Russian State (Chryssochoidis 2011: 267–282). Serhii Shumylo, in contrast, has demonstrated the importance of the self-governing Zaporizhian Sich, a fortified centre of the Ukrainian Cossacks located beyond the Dnipro (Dnieper, Borys-thenes) rapids from the 16th to 18th centuries, as a source of support for the Holy Mountain (Shumylo 2015: 16–42). Equally valuable are the studies of Mikhail Talalay, revealing the interconnections between pilgrimage and alms-collection extending into the 19th century and the Don region (Talalay 2016), and the recent works of Vitalii Tkachuk on the relations between Ukrainian regions and the Holy Mountain, pointing to patterns of behaviour that extend well beyond quasi-institutional systems of ecclesiastical finance (Tkachuk 2015: 121–130; Tkachuk 2025: 409–476).

Nikolaos Chrissidis has published extensively on the role of clergy and the circulation of ideas between Empires, with an emphasis on the discontinuities and misconceptions that characterised many of the connections between the Ottoman, Ukrainian and Russian worlds (Chrissidis 2015: 626–651; Chrissidis 2016), while Stefano Saracino has examined the confessional migratory patterns that emerged around alms-collection and explored their relationship to the activities of scholars moving between the Ottoman and Holy Roman Empires (Saracino 2018: 123–154; 2022: 63–97). This article attempts to place religion back at the centre of the history of Orthodox alms-collecting, arguing that fund-raising depended not only on economic networks and on the accumulation of symbolic capital, but also reflected a wider culture in which mobility and Charity converged with Sanctity and Redemption.

There can be little doubt that a profoundly religious worldview animated these alms-collecting Holy Men. Their actions drew inspiration from the Holy Texts, from the widow’s two mites (or lepta) (Mark 12:44), from the Christian ideal of Forgiveness, and from numerous other biblical exempla.⁵ This was a world in which miracles were not merely possible but expected, through the materiality of relics themselves.⁶ Poverty itself could be represented as a blessing, and alms-collectors frequently portrayed their activities not as mechanisms for maintaining economic equilibrium, but as sacred acts.⁷ Temptation was acute.⁸

⁵ IR NBUV [Institute of Manuscripts of the V.I. Vernadsky National Library of Ukraine, Kyiv], f. 232, item 164, 22v.

⁶ IR NBUV, f. 232, item 164, 35–40v., 126–126v.

⁷ “we are poor folk.” RGIA [Russian State Historical Archive, St. Petersburg], f. 796, op. 4, item 45, 1723, 14.

⁸ IR NBUV, f. 232, item 164, 109–109v.

The fear of Hell remained powerful.⁹ As the texts examined for the purposes of this article reveal, alms were given “to save the Soul.” Preaching and education formed part of this same moral economy.¹⁰ But the economy of Salvation was not, strictly speaking, primarily economic.

The spiritual landscape inhabited by such Holy Men was also populated by Angels and Demons. Such figures furnished a language through which the uncertainties of the road could be understood. The Devil, they wrote, “is no lover of Good” and seeks to estrange the monk from his Monastery and “destroy his work.”¹¹ In a world where Saints still wandered the immense spaces that stretched between States and Empires, it was the Devil also who could find work for idle hearts and minds.

At the same time, alms-collectors were more than pious wayfarers. Following the conceptual framework advanced in the collective volume edited by Roumen Avramov, Aleksandar Fotić, Elias Kolovos, and Phokion P. Kotzageorgis, alms-collectors should be understood as key agents within a transregional “monastic economy” (Avramov et al. 2021). Rather than isolated, Orthodox monasteries under Ottoman rule are shown to have participated in extensive networks of exchange that linked the Balkans, the Holy Mountain, and wider imperial spaces, especially the Adriatic, Danubian, Caucasian, Near Eastern, Ukrainian and Russian worlds. Within this system, the Holy Man collecting alms acted as an intermediary between distant communities, enabling not only the transfer of devotional practices but also the flow of goods, knowledge, and economic opportunity. Religious narratives interacted with a dense web of social relations to sustain the transimperial monastic economy. In this sense, Holy Men can be viewed as adaptive actors grounded in spiritual authority, who also operated as innovative mediators of religious and economic exchange.

This article also argues that changing practices of *Eleemosyne*, with the emphasis on such practicers being in a state of flux in the mid-18th century, should be understood as part of a broader transformation of the economic structures of the Balkans in relation, in particular, to Ukrainian lands. This contributed to a certain conception of progress connected, in some cases, to the advancement of both commerce and the imperial state (Voltaire 1878: 55–56). The autonomy enjoyed by alms-collectors created opportunities for pursuit of personal goals in parallel to institutional objectives. At the same time, the obstacles facing Holy Men were increasingly legal and administrative. A highly structured environment in which only a limited number of institutions could for-

⁹ IR NBUV, f. 232, item 164, 85–87.

¹⁰ Charity for education could be both an act of “utility” (pol’za) and “for spiritual Salvation.” RGIA, f. 796, op. 35, item 48, 1754, 1–1v. RGIA, f. 796, op. 14, item 8, 1733, 1–1v. For “pol’za,” see also IR NBUV, f. 232, item 164, 3–4.

¹¹ IR NBUV, f. 232, item 164, 109–109v., 110–110v.

mally participate was created. These ideas of “economic progress” sit uneasily, however, alongside the Christian imagination of Salvation or Redemption, for they presume a forward-moving arc of improvement in history. The suspicion of worldly progress as spiritually irrelevant may be located in many Christian authors.¹² While alms-collecting and its significance for ecclesiastical finances within the Ottoman Empire and in Moldavowallachia have already attracted scholarly attention, much remains to be done in order to clarify the “immanent structure of the social world” (Bordieu 1986: 241–258), and, by extension, the role of alms-collection in transforming not only economic and political but also religious life across imperial frontiers.

A synoptic portrait of our First Protagonist, Worldly-Wiseman Anatolios Meles

Would reveal a tall, swarthy figure at once cleric and strategist (Papoulides 2003; V. Hnatiuk 1906: 373–408). Depending on circumstances Ukrainian, Vlach, his father having been born in Braila (Vraila, Ibrail), and Greek, this complicated man was born in 1722 or 1723 in Zolotonosha, a small townstead whose toponym means ‘gold bringer’ some two-hundred kilometers southeast of Kyiv on the way to the Sich. His original name of Aleksey (Oleksey) was changed, as per standard practice, to Anatolios when he was ordained, his monastic name meaning ‘of the Orient.’¹³

Anatolios had been educated at the Kyiv Mohyla Academy. From Polish territories he travelled to Bucharest in 1747, and it was here Anatolios continued his education. Ordination as Hieromonk and acceptance into a monastic community was easier outside the confines of the Russian Empire. From Bucharest he journeyed further, to the Monastery of St. Paul on the Holy Mountain. While in Ottoman lands, he cultivated close ties with the powerful Furriers’ Guild, a Guild which underwrote Athonite Monasteries burdened by debt, and distributed funds to schools and other Orthodox institutions (Grigorovich 1870: 692–696).¹⁴

Anatolios’ mission northward from the Holy Mountain was undertaken in that period of relative peace following on the Ottoman-Russian war of 1736–1739. The Monastery of St. Paul had not collected alms in Cossack lands and the Russian Empire since 1718, so the journey represented an institutional gamble.

¹² Such works as Gregory the Great’s *Moralia in Job*, Part II, for example Gregory’s analysis of Job 1:1–5.

¹³ Perhaps more important than his ethnic identity per se, there are two saints he might have been tonsured after. The 3rd century mathematician Anatolios of Laodicia and the Ecumenical Patriarch Anatolios (449–458). Both hailed from Alexandria.

¹⁴ For more on Anatolios’ life, see RGIA, f. 796, op. 31, item 238, 1751, 90–94v. The substantial financial obligations of monasteries in the Orthodox East and the repayment of accumulated debts constituted a major objective of fundraising expeditions. TsDIAK, f. 229, op. 1, item 166, 63–63v.

Polyglot and well connected, Anatolios was uniquely positioned to navigate the fiscal and political exigencies of his monastic community, which was entangled in territorial and legal disputes with the Monastery of St. Dionysios.¹⁵

Shortly before his departure in 1749, Anatolios was elevated to the rank of Archimandrite by Ecumenical Patriarch Cyril V (Patriarch 1748–1751 and 1752–1757) in Constantinople, where he would also have received a pass from the Russian Resident (though he habitually travelled the Empire without papers, treating official documentation as mere suggestion).¹⁶ A vivid contemporary testimony is preserved in the account of the Ukrainian monk Serapion, who encountered Anatolios in Zaporizhia while awaiting passage along the Dnipro, as was usual practice for merchants and clerics travelling between Constantinople and Ukrainian lands in the mid-18th century (Carras 2015: 305–327). Serapion depicts a mobile repertoire of sanctity, with the charismatic Anatolios carrying sacred relics, icons, Gifts of the Magi and fragments of the Holy Cross, the Life-Giving Tree. Anatolios blessed the crowded Cossacks of Zaporizhia with Holy Water, and they all bowed down and “venerated by kissing (*lobyzali*)” the Cross. In this Serapion’s vision, the Holy Cross is seen drawing enthusiastic crowds of believers to a material place where suffering is transformed into renewal (Papoulides 2003: 23–24, 43, 49; Serapion 1873, 79).¹⁷ And also drawing them into proximity with the distant Monastery of St. Paul on the Holy Mountain, which, despite Anatolios’ donation of some fragments of the Holy Cross to the Empress Elisabeth Petrovna (1741–1762) in 1754, even today holds the largest surviving fragment of the Holy Cross. A fresco depicting the Last Judgment in the exonarthex of the Katholikon depicts the Holy Cross at its very centre.¹⁸ The Holy Cross and the other relics conveyed were to bring Anatolios into contact with the highest echelons of secular St. Petersburg society, whose members would seek him out to venerate them.¹⁹

Such activities did not go unremarked. The poet and Hierodeacon Caisarios Dapontes (1713–1784) from the same Monastery of St. Paul Xeropotamou

¹⁵ For alms-collecting by the Hieromonk Philip of the Monastery of St. Paul (“pavlogeorgievskii” reflecting the Monastery’s older dedication to Sts. Paul and George) in 1723, see RGIA, f. 796, op. 4, item 45, 7. For the importance of collecting alms in “Cossack towns and villages,” see IR NBUV, f. 232, item 164, 35–40v.

¹⁶ For Anatolios’ lackadaisical approach to passports and official documents, see RGIA, f. 796, op. 37, item 239, 1756–1760, 16–16v.

¹⁷ “The Life-Giving Cross,” the place where death becomes life. IR NBUV, f. 232, item 164, 35–40v. For corroborating archival material and the full list of all the relics, gifts and “Little Russian” attendants accompanying Anatolios, see RGIA, f. 796, op. 31, item 238, 1751, 30–31v., 96–7, 104–105. To understand why the Gifts of the Magi play no further role in this story, see RGIA, f. 796, op. 31, item 238, 1751, 22v.–22.

¹⁸ For the donation of a fragment of the Holy Cross to the Empress, see RGIA, f. 796, op. 37, item 239, 1756–1760, 36–37. For other fragments of the Holy Cross in Ukraine of that time, see TsDIAK, f. 127, op. 1020, item 2879, 8.

¹⁹ RGIA, f. 796, op. 31, d. 238, 1751, 72–73v.

praised Anatolios, presenting his achievements as exemplary. He credits him with securing a *Chrysobull*, or decree from the Empress Elisabeth Petrovna, granting an annual income to his Monastery, thereby inscribing the alms-collector within a heroic register (Sathas 1872: 146–147; Polyvios 1992: 183–203). His extensive poem of 1768, *Garden of Graces* (*Kepos Chariton* in the original), is not so much an autobiography as the literary self-fashioning of an Orthodox alms-collector, according him “symbolic capital” akin to canonisation. Dapontes transforms what could have been an administrative account of his fundraising mission into a spiritual pilgrimage, and at the centre of this pilgrimage is a eulogy to the Holy Cross: “Hail, Holy Cross, by whom Hell stood undone / Through you Mankind was saved, Redemption won” (Savvides 1995: 51–58).²⁰ While Anatolios’ journey thus marked the reestablishment of a fiscal corridor, Dapontes’ poetic rendering reflects a wider culture in which mobility and Charity converged with Sanctity and Redemption in both popular and elite imaginations.

A synoptic portrait of our Second Protagonist, Greedy but Disgraced Archimandrite Cosmas

Of the Great Lavra of the Holy Mountain, this being another Holy Man whose career unfolded within the dense networks of eighteenth-century alms-collection. A cornucopia of material on Cosmas has been preserved in fond 232, op. 164 of the National Library of Ukraine, material which has been examined in an excellent article by Oksana Prokopyuk and Vitalii Tkachuk on which this present article draws (Prokopyuk, Tkachuk 2020: 317–356; Tkachuk 2015: 121–130). Also relevant is material analysed by Yevhen (Eugenii) Chernukhin (Chernukhin 1994: 54–56; Chernukhin, 2001: 45–67).

The omens at the start of Cosmas’ mission appeared unquestionably favourable.²¹ Cosmas had studied in Venice, perhaps though not certainly at the Collegio Flanginiano, before moving to Ioannina (Yanya, Janinë), where he acquired linguistic fluency.²² A document, supposedly from 1740/1741, signed by Serbian and Greek Macedonian merchants from Vojvodina, emphasizes that Cosmas had proven “honest” during the duration of an alms-gathering expedition to the region. Further, Cosmas had an exquisite voice. Chanting in Church Slavonic, he could charm Slav speakers with his rendition of hymns. Equally significantly, it is noted that “he endured everything so as not to appear disobedient to the *Starets* (*Gerontas* or Monastic Elder) and his Monastery.” The document even outlines the characteristics that made Cosmas an ideal *Oikonomos*, a “worthy and loyal” Steward, catering to his Monastery’s needs. During

²⁰ “Chaire Timie Staur’, di ou Hades ekenothe / kai to genos ton vroton en tou Hadou elytrothe.”

²¹ Cosmas was one of the twin physician brothers martyred in 287. Sts. Cosmas and Damian practiced medicine free of charge and so were considered “anargyroi” or money-less.

²² IR NBUV, f. 232, item 164, 110–110v.

the alms-collecting expedition, he handed over all the money raised, without keeping even a penny (alternatively a *para*) for himself. And he even founded a *Metochi(on)*, a monastic dependency, although it is not clear from the text where this *Metochi* was located. All this, despite the fact that his *Starets* had slandered him, an indignity that Cosmas had endured with stoic humility.²³

These formative experiences, which read suspiciously like a prototype monastic curriculum vitae, should have shaped Cosmas into an intermediary capable of navigating both Greek and Slavic-speaking environments and performing the liturgical and rhetorical labour required to elicit donations. Before his departure on his major mission northwards, Cosmas was ordained Archimandrite by the Ecumenical Patriarch Paisios II (Patriarch 1726–1732, 1740–1743, 1744–1748 and 1751–1752). The ordination took place in a private ceremony held within the patriarchal cell, rather than in a church. Such private ordinations emphasised the personal trust placed upon the new Archimandrite and the exceptional character of his assignment, but they also suggest a form of patron-client relationship less than firmly based on formal ecclesiastical structures, pointing to private or sectional gain. Personal prestige cannot in the end be separated from services to the monastic community as a whole, for example, in the case of the Great Lavra, dealing with the acute problem of water supply which the Monastery was confronting at that time.²⁴

Empowered by letters from the Patriarch, as well as from other Church Hierarchs, Cosmas set out in 1744 for Bucharest. Like Anatolios, Cosmas was entrusted with the task of reaching St. Petersburg and presenting the Empress Elisabeth with the sole copy of a Charter issued by Peter I (1682–1725) and Ivan Alexeyevich (1682–1696), a Charter which granted alms on a regular basis to the Great Lavra.²⁵

Cosmas journeyed with a range of goods from the Holy Mountain designed to facilitate his fundraising. These included pectoral crosses and crosses for the blessing of waters, soaps, scissors, writing implements and other items. He also brought imprints of the Holy Mountain.²⁶ A catalogue of such items from 1746 also mentions that Cosmas was travelling with three ‘asterisk’ vessels used in liturgical services, and handmade rosaries (or prayer-ropes, I find the distinction unconvincing) by a certain ‘Dionysios Kausokalyvites.’ Though reference to a specific ‘Dionysios’ has not been found for the 18th century, the term ‘Kausokalyvites’ is significant. It means “those who burn their huts” (or “cells”), referring to a tradition of ascetic monks on the Holy Mountain who lived in extreme simplicity and detachment. The ‘Kausokalyvites’ became associated with the Kausokalyvia Skete, one of the most austere monastic com-

²³ IR NBUV, f. 232, item 164, 3–5.

²⁴ IR NBUV, f. 232, item 164, 7.

²⁵ IR NBUV, f. 232, item 164, 80, 102–102v., 105–108, 113–113v.

²⁶ IR NBUV, f. 232, item 164, 53–53v., 58.

munities, which developed as a loose network of hermitages under the spiritual jurisdiction of the Great Lavra. Their way of life emphasized solitude and continuous prayer in isolated cells scattered across the rugged terrain. This tradition is connected with the itinerant scholar and Hesychast theologian Neophytos Kausokalyvites (1689–1784). The attribution of rosaries to a specific individual was thus a characteristic feature of “charismatic” gifts. Paradoxically, however, it probably gave material expression to a worldview that was fundamentally anti-materialistic.²⁷

Cosmas also brought a large number of women’s headscarves. Once distributed, the reader can imagine their bright colours standing out against a wintry northern backdrop. All these items belonged to the material culture of Orthodox piety. The ‘Kausokayvite’ roseries, in particular, serve as a bridge between materiality and Hesychast visions that were spreading throughout Ukraine at the same time, ideal for constant recantation of the Jesus Prayer, “O Lord Jesus Christ, Son of God, have Mercy on my Sins” (Tkachuk 2022: 349–374).

In Wallachia with its own network of wealthy monasteries and *metochia* (Lazăr 2021: 112–129), Cosmas fell ill. More significantly, perhaps, he fell out with his Monastery authorities. Thus, in June 1748, Cosmas was requested to hand over to another travelling Holy Man of the Monastery eight letters granting Cosmas access to Moldavowallachia and nine official *grammatia*, or documents, permitting him to access Muscovy. Cosmas was also asked to hand over a copper printing plate in his possession used for engraving images of the Holy Mountain, such as are analysed in the work of Papastratou (Papastratos 1990), and a fragment of the Holy Cross. We see here an attempt to control the power bestowed through the written official word and, shortly prior to the commencement of print capitalism in the Danubian Principalities, the power bestowed by the printed image.²⁸

Cosmas must have refused to hand over these accoutrements, a case of the monastic agent going rogue, and he abandoned Bucharest shortly thereafter. It is noteworthy that Cosmas seems to have travelled within Moldavowallachian lands over a considerable period alone, without any helpers, which was uncharacteristic.²⁹ He did not reach Kyiv until 1749, however, and only then was he formally granted permission to collect alms within the Kyiv Metropolitanate.³⁰

In accordance with established practice, he was issued with a *zashnurnaya kniga*, a corded alms-collection book. Upon arriving in Kyiv, Cosmas paid

²⁷ For the orange beads of the rosary of ‘Dionysios Kausokalyvites,’ see IR NBUV, f. 232, item 164, 53–53v., 58, 119.

²⁸ IR NBUV, f. 232, item 164, 35–40v., 53–53v., 129. RGIA, f. 796, op. 478, item 282, 1766, 1–6.

²⁹ IR NBUV, f. 232, item 164, 7.

³⁰ Long-distance travel was expensive. One surviving estimate from the period calculated the cost of one person’s journey from Kyiv to the Holy Mountain at seventy-six rubles, including carriage hire and passage by ship from Constantinople to the Holy Mountain. IR NBUV, f. 232, item 164, 77.

sixteen rubles to have his collection carriage decorated with a large image of the *Panagia Oikonomissa*, Virgin Mary the Stewardess. This particular icon was connected to the promise that the Virgin Mary had made to Saint Athanasios the Athonite of Trebizond (c. 920–c. 1003), founder of the Great Lavra, that she would act as a ‘steward,’ taking care of the material needs of the Monastery. Something between advertising and self-promotion, the image conveyed a powerful message about Divine Protection and generosity.³¹

Cosmas supplemented this visual strategy with an effective slogan: “Let us restore the ancient friendship of Saints Athanasios and Antony.” This catchword combined Saints Athanasios the Athonite of Trebizond and Anthony of the Caves of Kyiv (c. 983–1073) with their namesakes Saints Athanasius of Alexandria (c. 296/298–373) and Anthony the Great (251–356). The latter two were indeed acquainted, with Athanasius of Alexandria having written the life of Anthony the Great, the Hermit. By linking Athanasios the Athonite with Antony of the Kyiv Caves, he constructed a symbolic connection between the Holy Mountain and Kyiv, presenting donations not as new obligations but as the renewal of an ancient friendship.³² Was this very different from Anatolios’ combination of Peter and Paul in the naming of his own Monastery, symbolising (on one reading) the parity of the Western and Eastern branches of Christianity, despite the fact that the Paul referred to in the monastic toponym was in fact the 10th century ascetic Paul of Xeropotamou? This sophisticated form of religious marketing worked in multiple regions, demonstrating the strategic thinking behind such practices.

The sources do not allow us to chart Cosmas’ route within Ukrainian lands in full. Cosmas’ initial movements took him through monastic centres such as Maksakovsky (or Maksakivsky) Transfiguration Monastery on the banks of the Desna River, a Ukrainian-baroque Monastery connected with the Orthodox revival of the 17th century.³³ Later he must have passed through Kozelets, Hadyach (Gadyach) and Poltava. In addition to raising money to meet immediate financial needs, he appears to have also pursued longer-term ambitions, including an attempt to establish a *Metochi* in Ukrainian lands, modelled on other Athonite or Sinai-linked institutions in Nizhyn and Kyiv respectively. In any case, Cosmas’ journey as a free man must have ended in Nizhyn.³⁴

While collecting alms in Ukrainian lands, Cosmas was drawn into a complex web of rumours and accusations. He even seems to have been accused of deception by his own Monastic Superior, Silvester, of not reporting his activities back to the Monastery and of acting without proper authorisation.³⁵ Had the Archimandrite’s progress come to a premature end?

³¹ IR NBUV, f. 232, item 164, 30.

³² IR NBUV, f. 232, item 164, 17–17v.

³³ IR NBUV, f. 232, item 164, 27–28.

³⁴ IR NBUV, f. 232, item 164, 35–40v., 132–132v., 135.

³⁵ IR NBUV, f. 232, item 164, 35–40v.

Holy Antipathy

The circumstances surrounding the downfall of Cosmas remain obscure, yet the chronology suggests a striking convergence of events. Cosmas was arrested by the state organs and taken to Nizhyn, the City of Law, for it was this city that housed the Nizhyn Greek *Kriterion*, the Court of Law relevant for the adjudication of issues pertinent to Greeks. Nizhyn was at the that time also the location of a Greek Brotherhood and a variation on Vanity Fair for Left Bank Ukraine, full to the brim with merchant wares and their associated delights. In this inland Port-City the investigation was conducted by Plato, or Platon Levitsky (†1749), Archimandrite of the Nizhyn Annunciation Nazareth-Mother of God Monastery.³⁶ Cosmas belongings were recorded and confiscated, including 1200 rubles and 30 gold pounds (*chervontsi*), but also silverware, brocade garments, damask fabrics and silks, as well as fragments of the Holy Cross.

At the same time, official investigations into Cosmas were gathering momentum. Hierodeacon Ambrose, one of the Nizhyn Brotherhood priests hailing from Morea (the Peloponnese) and connected to the Iveron Monastery on the Holy Mountain (with a dependency in the centre of Moscow itself), levelled a series of accusations. Cosmas was alleged to have intended to divert charitable donations for personal financial schemes in Wallachia. Based on the denunciation of merchant Witnesses, he was further suspected of maintaining an improper relationship with a woman during his stay in Ioannina. Many of the Nizhyn merchants were native to Ioannina, and so this fits with the perception of overlapping networks, ideal for the circulation of information and gossip. Such accusations allowed for comparison with an Archimandrite of Nizhyn, shall we call him 'Carnal Delight,' who had just recently eloped with his mistress Maria, the wife of a Nizhyn Greek merchant, and absconded from the city.³⁷

Along with a range of other accusations, Cosma was also suspected of forging letters of recommendation, the letters that Cosmas was delivering from Patriarch Paisios II not having been signed by the Patriarch himself, but by the Patriarchal Secretary. The accusations were soon transferred to the Spiritual Consistory of the Eparchy of Kyiv, the chief administrative and ecclesiastical court of the Kyiv Diocese presided over by the Metropolitan of Kyiv, Timothii/y (or Timofii, though smuggling an 'f' into such transliterations must constitute a form of Original Sin!) Shcherbatsky (Metropolitan of Kyiv 1747–1757 and later Metropolitan of Moscow 1757–1767). Upon receiving the accusations, the

³⁶ Archimandrite from 1746 to 1749, Platon was an important player, having been Professor of Theology at the Kyiv Mohyla Academy and Rector of the Moscow Theological Academy and Archimandrite of the Zaikonospassky Monastery in Moscow. The Nizhyn Monastery founded in 1716 was in the heart of the city (Gaponenko 2007: 44–49; "Platon Levitsky," *Russian Biographical Dictionary*, henceforth *RBS*, vol. 14, page nos. not provided as access to *RBS* was to online version without nos.).

³⁷ Others denied the veracity of such slanders. IR NBUV, f. 232, item 164, 85–91v., 136–136v.

Kyiv Spiritual Consistory dispatched an emissary to Nizhyn to seize Cosmas' property. By early November, formal interrogations by the Consistory were underway.³⁸

Accusations immediately emerged by members of the Nizhyn Brotherhood against the aforementioned Ambrose, who was labelled a "Traitor," a "Judas," and even the "Devil." A charge that he had dishonoured the Metropolitan of Kyiv was addressed to the Kyiv Consistory in early 1751. These charges were explicitly connected by Ambrose himself to the position he had taken on Cosmas. Members of the Brotherhood, he writes, told him: "Why did you make the written statement concerning the Archimandrite Cosma?" And he had answered: "That I had done them no wrong whatsoever." But they replied: "Whoever advised you to make that written statement, let him feed you." And, according to Ambrose, members of the Brotherhood slandered and dishonoured him, and threw his belongings out of the Brotherhood Church warehouse. Shortly thereafter, and given the extreme hostility so many Brotherhood members had shown towards his person, he received permission to leave Nizhyn and return to the Iveron Monastery on the Holy Mountain. A new Brotherhood Hierodeacon was dispatched from Bucharest in his place.³⁹ Many of Ambrose's claims seem to have proven fragile under scrutiny. Allegations of Cosmas' financial impropriety, illicit relationships, and attempts at bribery rested upon contradictions and uncorroborated testimony.⁴⁰ Here we are, I imagine, observers to an imbalance emerging in the life of the merchants. With religious symbols and that sense of the Holy deemed obligatory to Brotherhood's members called into question, the community transformed into a stage for extreme emotional outbursts that served to determine those excluded from membership.

As the official investigation progressed, attention shifted away from questions of Cosmas' morality and personal conduct. Instead, the Consistory focused on a matter of seemingly greater significance, the authenticity of a relic of the Holy Cross carried by Cosmas. After extensive inquiries, translations of Greek documents, and consultations, the Consistory concluded that the relic of the Holy Cross was of doubtful authenticity. Cosmas' alms-collection books were also examined, and it was found that he had exchanged pieces of the Holy Cross for payment. Thus, to mention one of three such instances, a Ukrainian had exchanged a gilded chalice and silver cups and spoons, as well as six rubles, in return for a fragment of the Holy Cross. Priceless things, it would appear, also have their price.⁴¹ The significance of the accusation, and the fact that the Athonite Cosmas was not a cleric of the Kyiv Metropolitanate meant that the

³⁸ See Oksana B. Prokopyuk's very thorough work on the Consistory (Prokopyuk 2008).

³⁹ TsDIAK, f. 127, op. 1020, item 2028, 2. Ambrose was accused of spreading slanders against Cosmas and others also. TsDIAK, f. 127, op. 1020, item 2013, 1–1v., 2, 13–14, 22.

⁴⁰ IR NBUV, f. 232, item 164, 90v–91.

⁴¹ IR NBUV, f. 232, item 164, 35–41v., 87v. –90.

Kyiv Spiritual Consistory was compelled to submit the case to the Most Holy Governing Synod (hereafter Holy Synod) in St. Petersburg for a final decision.⁴²

The Holy Synod ultimately confirmed the findings of the Kyiv Spiritual Consistory, though its judgement was delayed for several years, only reaching Kyiv in January 1755. Thus, a case that began with contested accusations of personal misconduct during the alms-collecting process ended as a broader struggle over the authenticity of relics, reaffirmation of the limits of the group, and ecclesiastical authority. More on these issues, presently.

Worldly Companions

As with many forms of rent-seeking activity in the eighteenth century, the system of *Eleemosyne* depended not only on formal but also on informal practices. Members of the higher clergy served as primary guarantors of this entire network of alms-collecting and relic authentication.⁴³ Access to other patrons, merchants and men of probity and reputation who provided money and advice, often determined, however, whether an expedition succeeded. Among the individuals mentioned as contacts in the case of Cosmas was a certain Kapnist, most likely Vasilii Petrovich Kapnist (1701–1757), father of the well-known poet and satirist, whose own father had been a Greek from Zakynthos (Zante). A landowner with substantial estates in the Poltava region, Kapnist occupied a strategic position within the social landscape of the ‘Hetmanate,’ illustrating the role played by second-generation migrants in bridging imperial systems of power. Kapnist acted as Cosmas’ confidant.⁴⁴

On 28 June 1752, Cosmas requested the Metropolitan of Kyiv Timothy Shcherbatsky that he might be allowed to deliver letters and gifts to patrons of even higher social standing, in particular the Hetman Kyrylo Rozumovsky (Kirill Grigorievich Razumovsky, 1728–1803), who had risen from a provincial Cossack family to become Hetman of the Zaporizhian Host (1750–1764), as well as his mother, Natalia Demianivna Rozumovska (Natalya Demyanovna Razumovskaya, †1762), the pious matriarch of the family, one of the influential figures in the ‘Hetmanate.’⁴⁵

A noteworthy Greek-language manuscript, undated, but probably dated to 1747, and certainly not later, in other words to the period just before Cosmas’ departure from Moldavowallachia, sets out the contacts that Cosmas was expected know and probably to approach upon his arrival in Nizhyn and, later, in Moscow and St Petersburg (destinations he was never to reach). This document

⁴² IR NBUV, f. 232, item 164, 41.

⁴³ TsDIAK, f. 127, op. 1020, item 2244, 1–5. TsDIAK, f. 127, op. 1020, item 2360, 1–2.

⁴⁴ IR NBUV, f. 232, item 164, 46–46v., 136–136v.

⁴⁵ IR NBUV, f. 232, item 164, 67–67v. For the ‘Great Logothetes’ and other ‘patrons’ within Moldavowallachian lands, see IR NBUV, f. 232, item 164, 145. Names that cross boundaries rarely admit authoritative transliteration. The ultimate *trahison des clercs* would be to forsake consistency in such matters.

may be viewed as a rough and ready alms-collector's "Who's Who?" We can only imagine how the list was compiled, and it remains unclear whether the list is in Cosmas's own hand. A translation of the scribbled Greek text into English would read as follows:

The Elders of Nizhyn. The lord [archon] sir [kyr] Voit. Lord Samuil Theodorou. The lord Dimitris Tzodavinos. The aforementioned Samouil is the first.

In the capital [stoletzan]. The lord sir Savvas Petrou and the lord Dimitrios Nikolaou. The aforementioned Savvas is the first.

The names of the High Priests of the Synod. Stephan of Novgorod. Platon Gortinski [Gortenske], Simon of Pskov [Ploskoveias], Mitrophanes of Tver [o Tv-ereias], Arsenios of the Troitski [Troïtzas], the Archimandrite Platon.

Archimandrites in the capital. Antonios of the Ispasi a good person. Porphyry of the Donskoi. The Great Secretary of the Synod Iakovos Arsenovikis [Arsenovekes]. The Great Secretary of the Synod Alexios Athanasiou, whose son Athanasios is dedicated to Saint Athanasios. The Great Chancellor [Kantzelieris] Bostouzas Petrovikis [Bestouzas Petrovekes]. Alexios Grigorievich [Alexios Gregorievekes] who is close to the Queen [kai oikeios tes Vasilese]. Anna Kneina Georgievna [E Anna Kneina Gkeourgkedesa]. The Highpriest of Nizhny Novgorod Dimitrios a good and important person [O Nezogradeias Archiereus Demetrios anthropos kalos kai spoudaios].⁴⁶

Precisely because it sheds light on the alms-collector's social world, it is worth reconstructing the field of relationships constituted by these individuals. Readers who dislike lists might prefer to skip to the next section, "agonistic asceticism and credit," following the end of discussion of this list.

In Nizhyn, Cosma was supposed no doubt to make contact with the head of the city's self-governing administration, the *Viit* (or *Voit*). At the time this office was held by Petr (Petros) Ternaviot(i/es) (c. 1700–c. 1774), the son of the Greek Sterio Ternaviot(es) (c. 1650–c. 1718), not mentioned by name on the list, but mentioned in others as particularly close to the Great Lavra, "we thank him

⁴⁶ "Proestoi tes Niznas. / O archon kyr Vouïtos. Archon kyr Samouel Theodorou. / O archon Demetres Tzodavinos. / O anothén Samouel o protos / Eis ten stoletzan. / O archon kyr Savvas Petrou / kai o archon Demetrios Nikolaou. / O anothén Savvas einai o / Protos. / Onomata ton archiereon tes synodou. / O Novgradeias, Stephanos. / O Gortenske, Platon. / O Ploskoveias, Simon. / O OTvereias (sic!), Mitrophanes. / O Troïtzas, Arsenios. / O Archimandrites Platon. / Eis ten stoletzan archimandritai. / Tou Ispasi Antonios anthropos kalos. / Tou Danskoi, Porphyrios. / O Megalos tes Synodou Sekretarios Iakovos Arsenovekes / O Megas tes Synodou Sekretaris Alexios Athanasiou tou opoiou o uios Athanasios einai eis to Agion Athanasion aphieromenos. / O megas Kantzelieres Bestouzas Petrovekes / O Alexios Gregorievekes kai oikeios tes Vasilese. / E Anna Kneina Gkeourgkedesa. / O Nezogradeias archiereus Demetrios anthropos kalos kai spoudaios." Here and elsewhere, it would be preferable if transliteration were not accepted practice. In general, I am consistently inconsistent in transliteration of the "eta," denoted as either "e" or "i," with a preference for "e" but depending on register; "beta" is transliterated with a "v." I have not noted rough breathing marks or accents. I thank Nikolaos Chrissidis for pointing out certain mistakes in my reading. IR NBUV, f. 232, item 164, 115v.

for the favour he has shown you.” Originally from Macedonian lands, Sterio had migrated to Nizhyn in 1671. Throughout the eighteenth century, the Ternaviot(es) family would play a prominent role as landowners and imperial officials in the Nizhyn region.⁴⁷

Another of the leading Greeks in Ukrainian lands that seems to have been in close contact with Cosmas, a gentleman of good quality, merchant and tax-collector, was, however, Samuil (Samouel and several other variations of the name) Peloponov (Pelaponov). He was one of the richest Greeks of Ukraine, whose grandiose neo-classical house was at that very time being constructed and still stands in Nizhyn's Greek quarter.⁴⁸ The document mentions that Cosmas was expected to establish contact with “the first” “Samuil Theodorou.” Samuil's father was indeed a Theodoros. Peloponov is mentioned in the document as “protos” or the “first,” which means that he had the primary position in the governing organ of the Brotherhood, comprised of up to twelve representatives elected every two or three years by male members of the Brotherhood (Carras 2020). Ambrose had claimed that Cosmas kept his money with Peloponov. Significantly, it seems that Peloponov had not been brought to examination in relation to the accusations against Cosmas. The fact that Ambrose was forced to leave Nizhyn suggests senior Brotherhood members at work.⁴⁹

No reference has been found to the Greek “Dimitris (Demetres/ios) Tzodavoinos.” Similarly, the people mentioned in the capital (which might mean Moscow), “Savvas Petriou” and “Dimitrios Nikolaou” remain an enigma. But the fact that “Savvas Petriou” is referred to as the first suggests some kind of organisation. Though I did not have access to the relevant material on the Greeks of St. Petersburg at the time of writing, it is clear that Cosmas was supposed to contact the leading lay Greeks in Ukraine and Russian Empire of the time, with many residing in Moscow (Shakhova 2015: 537–560).

There then follow a number of names of members of the Holy Synod. In the 1740s, the Holy Synod remained the central governing body of the Orthodox Church in the Russian Empire. Established under Peter I as a replacement for the Patriarchate, Bishops, senior clerics and officials participated in the direction of ecclesiastical affairs. Although Bishops were formally attached to their Diocesan Sees, in practice many prominent hierarchs spent extended periods in St. Petersburg, where the Synod was located. The Synod faced persistent challeng-

⁴⁷ IR NBUV, f. 232, item 164, 7.

⁴⁸ For Peloponov's building activities at this time, see TsDIAK, f. 51, op. 3, item 10974, 2–4v. For Peloponov as a *Krites* and a member of the Brotherhood governing Organs, appointing priests, see TsDIAK, f. 127, op. 1020, item 1199, 9–9v. For “Theodoros” as Peloponov's father, who had arrived in Nizhyn in 1689, and for Peloponov's Greek wife “Irina”, see TsDIAK, f. 57, op. 1, item 39, 748v–749. For Ternaviotes alongside Peloponov as the two leading Greeks in Nizhyn at this time, see TsDIAK, f. 127, op. 1020, item 1947, 7–8.

⁴⁹ For corroboration of the “Epitropoi” during this period, including Peloponov, see IR NBUV, f. 232, item 164, 146–146v.

es in recruiting suitable members, but membership could be augmented on an ad-hoc basis when necessary. The constant movement of bishops between sees, monasteries, and the Holy Synod contributed to instability in diocesan leadership, problems that reflected wider tensions within the post-Petrine Church (Ivanov 2020: 125–153; Bushkovitch 2007: 105–128; Barsov 1896: *passim*).

The first among those mentioned on Cosmas' list as a member of the Holy Synod is Stephan Kalinovskii of Novgorod (Stefan Kalynovsky, 1700–1753) who had received his education in the Kyiv Mohyla Academy. Continuing the programme of the leading theologian of the Petrine settlement Theophan Prokopovich (Feofan Prokopovych, 1681–1736), he served as Rector of the Slav-Greco-Latin Academy during the 1730s and Hegumen of the St. Alexander Nevsky Monastery, becoming a member of the Holy Synod in 1736. Knowledgeable in Greek, Kalinovskii was a highly respected biblical scholar and was to become Archimandrite of the Alexander Nevsky Monastery, Bishop of Pskov and, finally, in 1745, Archbishop of Novgorod (*RBS* vol. 19 1909).

Platon Gortinski ["Gortenske"] in all probability refers to Platon Malinovsky (Malynovsky, ca. 1680–1751). He was born in Chernihiv (Chernigov) and graduated and taught at the Kyiv Mohyla Academy and from there he was transferred to the same position at the Moscow Slavic-Latin Academy (an institution whose official designation was constantly in flux). Platon had been one of Prokopovich's opponents and had been arrested for defending Stephan Iavorskii's (1658–1722) anti-Protestant *The Stone of Faith*, though he was in fact a devoted reader of Protestant theological works. His rank was only restored when Elisabeth came to the throne. In 1742, Platon was ordained Bishop of Sarsky and Podonsky (but in fact resident in the Krutytsky *Metochi* in Moscow, with its tiled *Teremok*, or tower house, connecting the bishop's quarters to the Cathedral), and it is this residency that probably explains his rendition in Greek as 'Gortinski' (which sounds remarkably like an Eparchy on Crete, and reveals the difficulties in accurately conveying information across linguistic barriers). A member of the Holy Synod with the rank of Archbishop, he managed the Moscow Diocese and was appointed Archbishop of Moscow and Vladimir in 1748. The compiler of the list was not aware of this promotion (*RBS* vol. 14 1905).⁵⁰

Born, like Anatolios Meles, in the Cossack town of Zolotonosha, Simon Todorskii (Todorsky, 1700–1754), the third member of the Holy Synod listed, came from a Jewish background before converting to Christianity. He received his education at the Kyiv Mohyla Academy and later continued his studies at the University of Halle, where he came under the influence of the prominent Orientalist and Pietist Johann David Michaelis (1717–1791). At Halle, Todorskii focused on Semitic languages and amassed a considerable German-language library. Dur-

⁵⁰ Ilarion (Grigorovich) (1696–1760) replaced Platon (Malinovsky) to become Bishop of Krutytsky in 1748. He too was a graduate of the Kyiv Mohyla Academy, and he was a participant in the Synodal revision of the Slavonic Bible. He became a member of the Holy Synod in 1748 (*RBS* vol. 8 1897).

ing this period, he translated into Russian several influential devotional works, including (with financial support from Prokopovich) Johann Arndt's *True Christianity* and Anastasius the Preacher's *Teaching on the Beginning of the Christian Life*. In 1738 he was invited to return to Kyiv, where he taught Greek, Hebrew, and German at the Kyiv Mohyla Academy, and oversaw scholarship focused on Greek, Hebrew, and Aramaic philology. In 1742 he was called to the imperial Court and appointed tutor, religious instructor, and confessor to the future Peter III (1728–1762). He also served in the same capacity for Peter's fiancée, seeing to her conversion; she would later reign as Catherine II (1729–1796). Beginning in 1743, Todorskii held the position of Archimandrite of the Ipatiev Monastery in Kostroma and became a member of the Holy Synod. Two years later, he was consecrated in absentia as Bishop of Kostroma and Galich (a town in Kostroma province), before being transferred only months afterward to the episcopal See of Pskov and Narva. Renowned for their rhetorical skill, Todorskii's protestantising sermons were considered models of ecclesiastical eloquence. In 1748 he was elevated to the rank of Archbishop (*RBS* vol. 18 1904).

Mitrophan Slotvinskii or Slatvinskii, Archbishop of Tver (Mytrofan Slotvynsky, +1752) studied and taught at the Kyiv Mohyla Academy and was later appointed Rector of the Kharkiv Collegium. In 1730, he became Rector of the Moscow Theological Academy and Archimandrite of the Zaikonospassky Monastery. In 1738, he was consecrated Bishop of Tver and Kashin. From 1740 up until 1749, he was a member of the Holy Synod.⁵¹

Arsenii Mogilianskii (Mohyliansky, 1704–1770) was also educated at the Kyiv Mohyla Academy. In 1739, he began his teaching career at the newly established Theological Seminary in Tver. Shortly thereafter, he was transferred to the Moscow Theological Academy. On taking monastic vows, he joined the Trinity Lavra of St. Sergius. Appointed Court preacher in 1743, he quickly earned favour and was subsequently named Archimandrite of the Trinity Lavra as well as Rector of its Seminary. His advancement continued the following year when he was consecrated Archbishop of Pereslavl-Zalesskii and appointed Vicar of the Moscow Diocese (Metropolitanate of Moscow). At the same time, he became a member of the Holy Synod. In 1757, Mogilianskii was to reach the pinnacle of his career with his appointment as Metropolitan of Kyiv, Galych (Halych, Galicia, in Western Ukraine), and “All Little Russia.” Throughout his tenure, he maintained a commitment to Prokopovich's curriculum in theological education and took a particular interest in the development of the Kyiv Mohyla Academy (*RBS* vol. 2 1900).

The “Archimandrite Platon” refers to the German speaking Platon Petrunkevich (Petrunkevych, 1700–1757) who was born in Sosnitsa near Chernihiv. He had been a student of Prokopovich and had graduated from the Kyiv Mohyla Academy before teaching at the Cadet Corps in St. Petersburg. In

⁵¹ There is no entry for Mitrophan Slotvinskii in the original *RBS*.

1742 he was elevated to the rank of Archimandrite of the Transfiguration Monastery in Sevsk, on the direct route from Nizhyn to Moscow. He served on the Holy Synod during the 1740s, and in 1748 was to become Bishop of Vladimir and Yaropolk. The compiler of the list was not aware of this promotion (*RBS* vol. 14 1905).

There follows a note of archimandrites ‘in the capital,’ on which the compiler includes only a few archimandrites, not to mention that by the ‘capital’ he seems for the most part to understand Moscow. Antonii Illiashevich of the Novospassky Monastery in Moscow (Illiashevych, c. 1680/1685–1755), renowned for his impeccable conduct and refined manners, was born into an aristocratic family in the city of Stryi (Stryj) within the Polish Lithuanian Commonwealth. He received his education at the Kyiv Mohyla Academy before assuming teaching positions at several educational institutions. In 1739, he was elevated to the rank of Archimandrite of Moscow’s Novospassky Monastery and appointed to the Holy Synod. During this period, he also served as superintendent of the Moscow Printing House. In 1748, he was consecrated Bishop of Vyatka and Velikaya Perm. The compiler of the list was not aware of this promotion (*RBS* vol. 2 1900).

Porphirii Kraiskii of the Donskoi Monastery in Moscow (Porfyrii Kraisky, 1707–1768), another cleric of Ukrainian origin, received his entire education at the Slavic-Greek-Latin Academy in Moscow. He had an excellent command of Greek, perhaps learning it directly from merchants who resided in the Monastery of St. Nicholas, directly adjacent to the Academy. After taking monastic vows in 1732, he was appointed to teach rhetoric at the Academy. He soon acquired a reputation for his pedagogical habits, including the formulation of special dietary regimens intended to enhance students’ memory, measures that seem to have been effective, since among his pupils was Mikhail Lomonosov (1711–1765). In 1737, Kraiskii was made instructor in philosophy at the Academy. Five years later, in 1742, he became Rector of the Academy and Archimandrite of the Zaikonospassky Monastery. In 1747, he was appointed Archimandrite of the Donskoi Monastery, and the compiler of the list is aware of this promotion, hence the dating of the information on the list to 1747. The following year, he was consecrated Bishop of Suzdal, and then subsequently as Bishop of Kolomna and Kashira, and Bishop of Belgorod (*RBS* vol. 14 1902).

Yakov Shakhovskoy (1705–1777) also maintained strong ties to Ukraine. Early in his career, he served in a variety of military and administrative capacities under the patronage of his uncle, Aleksey Shakhovskoy (c. 1690–1736), since 1731 Governor of Little Russia. Shakhovskoy participated in the Russo-Turkish War of 1736–1739. As an officer in a cavalry regiment, he took part in the campaigns at Ochakiv (Ochakov, Özi Kale, Alektor etc.) and Khotyn (Khotin) under the command of the Field Marshal Burkhard Christoph von Münnich (1683–1767). In 1741, he was appointed to the Senate. With the accession of Elisabeth this layman secured appointment as Ober-Procurator of the

Holy Synod, the official responsible for overseeing the Church on behalf of the state, an office he held until 1753. Shakhovskoy was involved in correspondence with the Empress concerning Anatolios Meles and the granting of alms to the Monastery of St. Paul.⁵² After his departure from the Holy Synod, Shakhovskoy continued to occupy positions within the imperial administration and composed an autobiography. The patronymic noted on the list would appear to be a mistake (*RBS* vol. 23 1911).

Very little information could be found concerning Aleksei Athanasiev, who is recorded as Secretary of the Synod, and whose son, and this was considered sufficiently important to be specially noted, was devoted to Saint Athanasius, though it is unclear what exactly this means. A Secretary of the Synod in 1747 was a senior official in the Synodal Chancery, usually a civil servant and not a churchman.⁵³

Count Alexei Bestuzhev-Ryumin (1693–1766) was one of the most influential foreign policy architects of the mid-eighteenth-century Empire, serving from 1744 on as State Chancellor of the Russian Empire under Elisabeth. Through a life of debauchery and intrigue, Bestuzhev-Ryumin supported a range of policies, including those that positioned Russia as a protector of Orthodox Christians under Ottoman rule. It was Bestuzhev-Ryumin who was to sign the *Chrysobull* granting the Monastery of St. Paul three thousand roubles and Anatolios Meles himself one thousand roubles (Papoulides 2003: 59, 63–64; *RBS* vol. 2 1900).

Aleksei Grigorievich Razumovskii (Oleksii/ey Rozumovsky, 1709–1771), began his courtly career as a singer in the imperial palace choir and was also an accomplished bandura player. He later rose to prominence as the most trusted confidant andmorganatic husband of Empress Elisabeth. As mentioned above, his brother Kyrylo Rozumovsky went on to become Hetman of the Zaporizhian Host (*RBS* vol. 15 1910).

Anna Georgievna from the noble Sidamoni line (Ana Giorgis asuli Sidamon-Eristavi, 1706–1780), daughter of George/i, Duke of Aragvi, wife of Prince Bakar Vakhtangovich Bagrationi of Kartli, Georgia (Bakar Vakhtangis

⁵² RGIA, f. 796, op. 31, item 238, 1751, 86, 90–94v.

⁵³ Aleksei Morsochnikov, the more likely candidate, was a senior official in the Synodal Chancery at the time. Another was Aleksei Semenovich Kozlovskii (1707–1776), later to become Ober-Procurator himself. Both appear in the catalogue compiled by A.O. Gulyaeva of RGADA [Russian State Archive of Ancient Acts], f. 1183 [Moscow Office of the Synod], op. 1, section 8, 1748–1750, http://rgada.info/opisi/1183-opis_1-8.pdf [accessed 6 January 2026]. There are more signatures in relevant documents examined bearing the name of Morsochnikov. See RGB [Russian State Library], Nauchno-issledovatel'skii otdel rukopisei [Research Department of Manuscripts], fond 277, op. 1, item 1, *Collection of Decrees of the Holy Synod, 1745–1749*, folia 476 <https://lib-fond.ru/lib-rgb/277/f-277-1/> [accessed 6 January 2026]. An attempt was made to locate the relevant name in the relevant Decrees (Ukazy) of the Senate of 1747, RGIA, f. 470, op. 7, item 20. I thank Nikolaos Chrissidis for his help with this issue. <https://www.prilib.ru/item/1964153?ysclid=mrucq3h9bn6339961503> [not successfully accessed in February 2026].

dze Bagrationi, 1699/1700–1750). Prince Bakar was the eldest son of King (*Mepe*) Vakhtang VI of the Bagrationi dynasty (1675–1737), and served as regent of Kartli several times. In 1724, following on from the collapse of Vakhtang VI's rule, Bakar accompanied the royal family into exile in the Russian Empire. There he entered Russian service, attaining the rank of Lieutenant General of the Russian artillery, and helping maintain the Georgian émigré community, which, like many Greeks, was to be found near and around St. Nicholas' Street in the centre of Moscow. Bakar also sponsored the Georgian printing press in Moscow and the 1743 Georgian Bible edition (Lang 1957: 30, 139–146, 286).

Finally, the list ends with one more Bishop, though he is termed 'Archpriest Dimitrios of Nizogradeia' meaning Archbishop of Nizhny Novgorod. Dimitri Sechenov (1709–1767) was born in Moscow and educated at the Slavic-Latin Academy where he subsequently taught. He was designated Bishop of Nizhny Novgorod and Alatyr in 1742, where his attempts at forced conversion of non-Russian Erzyas (or Mordvins, a Finno-Ungic group) in parts of his Diocese provoked an uprising. He was passionate about introducing the teaching of German and Greek into seminaries in his Diocese. Eventually he was to serve on the Holy Synod, and was elevated to the rank of Archbishop of Novgorod and Velikiye Luki, in which capacity he was to officiate at the coronation ceremony of Catherine II. He is recorded on the list as a "a good and important person" (*RBS* vol. 6 1905).

Kalinovskii, Todorskii and many of the aforementioned exemplify the Ukrainian ecclesiastical influence and scholarly traditions that characterized the Russian Church and Empire on the cusp between Reform and the Russian version of *Frühauflklärung*. Their careers also illustrate the importance of transnational scholarly networks, and the overlap between networks of scholarship, Charity and market exchange. The merging of Greek and Ukrainian networks at the centres of Russian power is evident, not only in this list, but also through the role of actors like Anatolios Meles. In fact, learning Greek was considered useful for up-and-coming Ukrainians, at least that was an argument made in favour of one Greek language school in mid-18th century Ukraine.⁵⁴ These figures at the imperial Court were the contacts that Cosmas should have known of, a case of information transfer. In probability, these were also high-ranking patrons with whom he was expected to be in contact. The list comprises individuals of social standing, many Ukrainians, many of those trained in the Kyiv Mohyla Academy and the Slavic-Latin Academy, and many fledglings from Prokopovich's nest.

The inclusion of Anna Georgievna and Cosmas' appeal to Natalia Rozumovska reveals the significant role played by women in alms-collection. Widows appear particularly prominently among almsgiving networks, especially in

⁵⁴ "Many children from Little Russia would gladly be able to study the Greek language; this would be a promising undertaking and would be highly useful." RGIA, f. 796, op. 14, 1733, item 8, 1–lv.

Ukraine, reflecting their control over property under the legal framework of the 'Hetmanate' (Kryvosheia 2022: 7–24). The list also suggests the importance of the Caucasus to the geography of Orthodox alms-collection.⁵⁵

If “symbolic capital,” his perceived holiness, was the alms-collector’s most valuable resource, this undoubtedly contributed to what in Pierre Bordieu’s terms would be called “social capital,” relationships set out in a document such as this one. Almsgiving was a process through which “symbolic” and “social capital” were communicated and then converted into economic capital for the sake of the Monastery. But “symbolic capital” and “social capital” are difficult to gauge, as they are not themselves denominated in monetary units. And networks of trust can break down for many reasons, especially when times are hard.

Agonistic asceticism and credit

One of the most significant points of intersection between almsgiving and commerce involved systems of debt and credit. Transporting large quantities of cash across long distances presented risks and alms-collectors relied upon financial instruments such as the *Veksel*, the Bill of Exchange, to overcome these difficulties.⁵⁶ These transactions depended upon merchants capable of honouring Bills in multiple locations, people like Samuil Peloponov. Though not mentioned in the relevant document of 1747, the activities of the Macedonian Greek merchant Anastasios Krommydas provide a revealing example of how contacts worked in practice. Krommydas was another who advised Cosmas on the use of Bills of Exchange and maintained commercial connections linking Ottoman and Russian markets.⁵⁷

The use of Bills of Exchange depended upon trust. Here, the “symbolic capital” of monasteries played a crucial role, serving as guarantees of reliability (Cotovanu 2021: 155–180). Significant for this convergence between charitable practices and economic exchange were systems of inheritance, with wills being pledged and claimed in advance, activities that Cosmas continued to coordinate even after his arrest.⁵⁸ Sacred objects and relics, on the one hand, and Bills of Exchange, on the other, shared similarities insofar as both depended upon trust among the parties involved. Both were accompanied by documentation and nar-

⁵⁵ Two persons who are not to be found on the list are the Silvester (Sylvestr) Kuliabka (1704–1761), born in the region of Poltava, at that time Bishop of Kostroma and Galich, and the confessor to the Empress Elisabeth (*RBS* vol. 18 1911), Theodor (Fedor) Iakovlevich Dubianskii (Fedir Yakovych Dubianskyi, 1691–1769), born in a village near Nizhyn (*RBS* vol. 6 1905). Interestingly, both interacted with Anatolios. Dubianskii helped Anatolios organise elite veneration of the relics conveyed. I remain uncertain whether their connection to Anatolios should be considered a significant factor in their non-inclusion on the list. This would further institutionalise the Anatolios/Cosmas affair. RGIA, f. 796, op. 31, item 238, 1751, 48–50, 62–62v., 72–73v.

⁵⁶ IR NBUV, f. 232, item 164, 35–40, 53–53v.

⁵⁷ IR NBUV, f. 232, item 164, 136–136v.

⁵⁸ IR NBUV, f. 232, item 164, 67–67v.

rative corroboration certifying authenticity. Anatolios' Holy Cross, for example, was accompanied by an epistle by the Ecumenical Patriarch Cyril noting its provenance, a gift from "Stephan, Ruler [Kralj] of Serbia." And the epistle continues "the written testimonies and the seal of Karyes regarding these matters have been diligently examined."⁵⁹

Monastic institutions also faced what economists describe as a principal-agent problem. Representatives operating from afar enjoyed autonomy, creating opportunities for conflict over accountability.⁶⁰ While the relationship with the *Starets* was hierarchically ordered, delays in communication could foster both suspicion or rivalry: "Lord have Mercy, how utterly alien and strange You have become."⁶¹ The changing internal politics of a Monastery or a Patriarchate complicated matters further.

Given the idiorhythmic organization of monastic life on the Holy Mountain, monasteries could undertake initiatives simultaneously (Kotzageorgis 2011: 163–190).⁶² In fact, the autonomy enjoyed by travelling alms-collectors as agents of these "multidimensional firms" created opportunities for individuals to pursue personal goals in parallel to institutional objectives (Kotzageorgis 2021: 98–111). Though in Ukrainian lands Greek *metochia* were not permitted extensive landholding, their establishment nonetheless could offer the alms-collector a steady source of funds, enhancing his status within the Monastery.⁶³ As witnessed in a document of 1756 concerning Gregorios, a Hieromonk of the Hilandar (Chilandarion) Serbian Monastery, who's aim was supposedly "to bribe the Turks upon his return and drive the Serbs away from that monastery," ethnic differentiation might become an element in this agonistic asceticism.⁶⁴ The values of hard work and perseverance were an integral part of alms-collecting. But it would not be unreasonable to claim that monks such as Anatolios and Cosmas demonstrated not only the quality of perseverance, but also high degrees of agonistic asceticism and economic entrepreneurship, only somewhat concealed by the fact that they were in the service of mortmain institutions (Chryssochoidis 2006: 89–104).

⁵⁹ Stefan Nemanjić, ruler of Serbia (c. 1165–1228). The seal of the Protaton of Karyes, the administrative centre of the Holy Mountain, functioned as a mark of institutional authority and authentication. TsDIAK, f. 59, op. 1, item 1878, 1750–1751, 17v.

⁶⁰ IR NBUV, f. 232, item 164, 109–109v.

⁶¹ IR NBUV, f. 232, item 164, 22, 109–109v.

⁶² Not all establishments of the time were idiorhythmic. Paisy Velichkovsky, for example, consciously set up a cenobitic Charter for his Skete with monks living-closely-together. TsDIAK, f. 127, op. 1020, item 3443, 32–33v.

⁶³ For a similar establishment by monks of the Holy Mountain in New Serbia, see RGIA, f. 796, op. 48, item 226. Regulations restricted the donation of land to monasteries in the 'Hetmanate' (Prokopyuk 2023: 169–191).

⁶⁴ IR NBUV, f. 160, item 185, 78–78v.

Valley of Humiliation

A further layer of complexity was introduced by the involvement of Anatolios Meles, the shaddowy presence behind Cosmas' travails. Anatolios had met Cosmas while they were both in Perevolochna (Perevolochnaya) in July of 1750, a customs station of the 'Hetmanate's' south, on the lower Dnipro.⁶⁵ This settlement with its boatmen served as a gateway between the forest-steppe regions of central Ukraine and the lands of the Zaporizhian Sich. Though we do not know what transpired in this town, Cosmas stated in a report to the Metropolitan of Kyiv that Anatolios had "slandered him even in Perevolochna."⁶⁶ Anatolios for his part continued his movements, visiting his hometown of Nizhyn. According to Cosmas, Anatolios had boasted to members of the Greek community in Nizhyn that he intended to have him destroyed.

The Worldly-Wiseman Anatolios' arrival in Kyiv appears to have coincided with the submission of the denunciation against Cosmas by Hierodeacon Ambrose, a report delivered through Eugenios, Hegumen of the Sinai St. Catherine Monastery in Kyiv, to the Kyivan ecclesiastical authorities. Significantly, when reflecting upon his subsequent imprisonment, Cosmas consistently identified only Anatolios Meles as the one bearing responsibility. He made no comparable accusations against Ambrose and others.

On arrival in Kyiv in the Spring of 1751, Cosmas was held in the Sts. Peter and Paul Monastery. Later he was transferred to the Sinai St. Catherine Monastery of the Greeks. While confined to the Monastery of the Greeks, without the right to perform liturgical services, Cosmas pleaded that he did not have sufficient funds even for his own clothing. He requested alms, and he wrote letters attempting to prove that he had been lawfully dispatched by the Great Lavra, with permission for his use of fragments of the Holy Cross.⁶⁷

Once the case had been adjudicated and he had been found at fault, mounted escorts were assigned to accompany Cosmas to his place of confinement. The journey itself was financed from the alms Cosmas had collected. Thus, in early 1755 Cosmas arrived at the Kirillo-Belozersky Monastery, or Dormition Monastery of St. Cyril, in the Vologda Diocese, with its monumental ramparts reflected on the surrounding lake.⁶⁸

Crucially long before this point Cosmas had changed stance. He had accepted that, although he had been entrusted with a fragment of the Holy Cross,

⁶⁵ TsDIAK, f. 59, op. 1, item 1878, 1750–1751, 7. For Anatolios' passport from Perevolochna, dated to September 1750, see <https://www.familysearch.org/ark:/61903/3:1:3QHV-V7KZ-X4H-C?view=explore&groupId=TH-7749-152405-43130-29&grid=on&lang=en> [accessed 14 January 2026]. The document corresponds to TsDIAK, f. 127, op. 1024, item 613, 1. I thank Vitalii Tkachuk for drawing my attention to this online document.

⁶⁶ IR NBUV, f. 232, item 164, 74.

⁶⁷ IR NBUV, f. 232, item 164, 32. TsDIAK, f. 127, op. 1020, item 2223, 2–9. IR NBUV, f. 232, item 164, 26–26v.

⁶⁸ Some four-hundred and fifty kilometers North-East of Moscow. IR NBUV, f. 232, item 164, 25.

the authorities of the Great Lavra had requested in 1748 that it be returned to them. When Cosmas set out for Ukrainian territories, he had used an ancient wooden cross entrusted to him by the *Starets* Parthenios, although Parthenios had not explicitly clarified whether this was, in actuality, a fragment of the Holy Cross. He begged the Metropolitan (and later the Holy Synod) forgive him this oversight: “a Sin I freely acknowledge. Yet, seeing as you are the living embodiment of Christ’s authority [...] I implore you to forgive this Sin [...]”⁶⁹

Aspects of Cosmas’ change of stance merit attention. Firstly, the identity of the Holy Cross was a matter of spiritual authority, sustained both by traditions transmitted within a given monastic institution and by the personal emotions and devotional practices directed towards it. Charisma can be conducive. At a time when the Cossack rank and file could believe that the Metropolitan of Corinth was the Ecumenical Patriarch himself (Plokhyy 2001: 255), such fragments of the Holy Cross could be imbued with the sacred through the enthusiasm of the community that venerated them.⁷⁰

Secondly, Cosmas reverts to tropes of Penance and Forgiveness. The connection between Penance and alms-collection appears in documents of the time, as in the case of a certain Hieromonk, who had revealed himself to be “a man of Evil deeds (*zlodei chelovek*),” but should nonetheless be forgiven, for the sake of the “Salvation” of his Soul.⁷¹ Penitence was central to the purpose of the difficult journeys made by both pilgrims and alms-collectors. The centrality of penitence is extended from those being judged to those judging, as all are called on to show Forgiveness.

Such penitence may not have been the quickest way to freedom, but it was undoubtedly the surest. Cosmas now enjoyed the full support of the authorities of the Great Lavra, who requested permission for Cosmas to be allowed to celebrate the Divine Liturgy and to be released, as an act of Charity (*na milost’*) despite his “holy foolery” (*iurodstva dukhovnogo*), partly, it was argued, because he was wasting away, and partly because the novice sent in 1751 to support him, Potapios, did not speak Russian, and so had been unable to participate in the sacrament of Confession in recent years. The request was appropriate on one level at least, Confession being the ritual associated with Penance, though it is interesting to note that the Penance requested here is not that of Cosmas himself, but of a wider community.⁷² A series of letters confirmed many of Cosmas’ claims.⁷³ Pleading letters were sent by the Hegumen of the Great Lavra and by all the monastic Brotherhood to the Metropolitan of Kyiv, to the members of

⁶⁹ IR NBUV, f. 232, item 164, 46–7, 95v. –96.

⁷⁰ IR NBUV, f. 232, item 164, 12–13.

⁷¹ TsDIAK, f. 127, op. 1020, item 2879, 4–4v.

⁷² For Potapios, an almost speaking name meaning “from one’s own country” and his mission, see IR NBUV, f. 232, item 164, 22v., 54–54v., 63–63v., 68, 79.

⁷³ IR NBUV, f. 232, item 164, 146–146v.

the Holy Synod, and to Elisabeth herself.⁷⁴ Angry epistles were also sent by the Hegumen and the Sacristy-Keeper of the Great Lavra to Anatolios himself. In one letter, surprise at the “Evil” that Anatolios, “who fears neither God, nor feels shame before men,” had committed against Cosmas was expressed.⁷⁵ And gifts were distributed.⁷⁶

What wages are you accustomed to receive?

What, then, can these stories reveal about the interface between practices of Charity and market exchange in the mid-18th century Balkans and Ukraine?

Upon his return to Constantinople, Anatolios was absorbed into the administrative machinery of ecclesiastical property. He was appointed to several positions of authority, including *Ephoros* or *Nazir* and *Mütevelli* (Commissioner) of various institutions such as the *Metochi* of Kalamaria and the *Waqf* of his Monastery. With the backing of the Furriers' Guild, Anatolios successfully resolved the long-standing dispute with the Monastery of Dionysios (Kotzageorgis 2002: 214–215, 270–271). Following a subsequent journey to St. Petersburg and amid accusations that accumulation of wealth had facilitated advancement, Anatolios was consecrated titular Bishop of Melitene (today's Malatya in Central-Eastern Turkey) in 1756 by Patriarch Cyril V (Papoulides, 2003, 69–75, 87–95).⁷⁷

Anatolios' return to the Russian Empire in the late 1750s brought him into conflict with the Holy Synod, which disputed his claim to episcopal status and charged him with performing ecclesiastical rites in Zaporizhia, and not even commemorating the Metropolitan of Kyiv in services conducted within the latter's See.⁷⁸ Under the patronage of Catherine II, however, he was recalled from exile in Siberia, and was to play a political role seconded to the Russian navy in the Russo-Turkish War of 1768–1774 (*Russkii Arkhiv* 1870: 744–768). He assisted in the flight of the Ecumenical Patriarch Seraphim II (Patriarch 1757–1761) to a squadron off the coast of the Holy Mountain (Papoulides 1976, 59–66).⁷⁹ Having returned to the Empire, he was appointed Hegumen of another Monastery of Sts. Peter and Paul (coincidence or jape?), this time in Hlukhiv (Glukhov). In his final years he could be found imagining himself a naval commander. He insisted that monks trained in rowing, running, the ringing of bells and the firing of mortars, among other sports, no doubt in accordance with a plan of Divine Providence “to improve their bodies and their souls.” A detail of some narrative

⁷⁴ IR NBUV, f. 232, item 164, 105–108, 140–140v.

⁷⁵ IR NBUV, f. 232, item 164, 143.

⁷⁶ IR NBUV, f. 232, item 164, 7.

⁷⁷ For the accusations, see RGIA, f. 796, op. 37, item 239, 1756–1760, 1–2.

⁷⁸ RGIA, f. 796, op. 37, item 239, 1756–1760, 74, 269–270v.

⁷⁹ Alongside his brother Ivan Vasil'ev Meles, Anatolios had long been involved in assisting Russian captives return from the Ottoman Empire. TsDIAK, f. 59, op. 1, item 2858, 1756, 2.

significance, he died, probably in 1775, a bitter man (Ponomarev 2015: 131–140; Tupyk et al. 2013: 275–278).⁸⁰

As for Cosmas, we have no way of knowing the sincerity of his brokenness, but he is reported to “have reached a state of mental alienation and insanity.” Even his eyesight was increasingly poor. Thus in 1757 Cosmas was permitted to return to the Great Lavra Monastery (Chernukhin 2017: 53–76).⁸¹ His helper Potapios would eventually continue Cosmas’ work during the 1760s, at the head of a group that set up a *Metochi* of the Great Lavra and a “Helleno-Greek” school in the border region of New Serbia, central Ukraine, Kirovohrad region today (Tkachuk 2016: 99–107).⁸²

By the middle of the eighteenth century, the principal obstacles facing itinerant monks were no longer geographical distance or physical danger but legal and administrative restrictions. A highly structured environment in which only a limited number of institutions could formally participate was created. The right to solicit donations functioned increasingly like other economic privileges, including tax farming or, more frequently for Cossack communities, exclusive access to natural resources, as has recently been analysed for the Don region (Abesser 2025: 13–38). Monastic institutions sought to secure similar oligopolistic access.⁸³

Nonetheless, cultures of Charity fostered wider cohesion by creating spaces for collaborative action. More than a simple act of collection, the alms-collector’s journey crossed a series of boundaries, between men and women, town and countryside, and different strata of society. Through processes akin to confessionalisation, alms-collecting fostered solidarities, providing an opportunity for the formation of Cossack identities, and popularising the notion of an Orthodoxy commonality (Plokhly 2001: 341–342). The significance of alms-collection thus extended beyond the rendering clean of accrued wealth. Such activities were not simply imposed from above, rather they constituted the visible manifestation of a culture emerging from the aspirations of a community.

Finally, and this is perhaps the point at which the various narratives concerning Cosmas and Anatolios converge, the story of these ‘Holy Men’ is retold in the bureaucratic and legal language examined here in the form of exempla, but with an interpretive openness that exposes the instability inherent in exemplary discourse, rendering the tale a site where authority is both asserted and negotiated. Repeated warnings were directed against the loss of one’s Soul. A

⁸⁰ A list of his clothing at the time of his death includes several items from the Aegean. TsDIK, f. 127, op. 1024, item 2373, 35–35v. <https://www.familysearch.org/ark:/61903/3:1:3QHV-L7KZ-J998-6?view=explore&groupId=TH-7762-152418-24805-44&lang=de> [accessed January 2026].

⁸¹ IR NBUV, f. 232, item 164, 64–65. For his eyesight, see TsDIK, f. 127, op. 1020, item 2223, 6. For a letter by the Russian Resident in Constantinople concerning his goods, see TsDIK, f. 127, op. 1020, item 2772, 1–1v.

⁸² RGIA, f. 796, op. 43, item 182, l. 1.

⁸³ For monastic oligopolistic access, see TsDIK, f. 127, op. 1020, item 2879, 22–22v.

subsequent alms-collector from the Holy Mountain was to pledge that he would not “commit violations,” such as those committed by “the Archimandrite of the Great Lavra.”⁸⁴ Such tales of temptation and remorse set an example, functioning as incentives that encouraged the arduous journeys, the extraordinary struggles, undertaken: “we exhort you to this one thing, that your deeds may shine before men.”⁸⁵

The alms-collector thus emerges as a structural paradox within the economy of Charity, as a figure at once suspect and Holy, mediating between Sin and Redemption through material exchange. Within such tensions, “progress” can never fully coincide with with Redemption. In competition with each other, Cosmas and Anatolios become progressively entangled in the forms of capital the alms-collector was seeking to transform. The resulting tale exceeds conventional accounts of enrichment or corruption, the danger of capital residing not solely in possession, but in proximity. In seeking to convert Holiness into money, and money into Holiness, both figures are gradually converted by the demands capital places upon them. The only way out is Cosmas’ Repentance.

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⁸⁴ The Archimandrite Chrysanthos in 1756. TsDIAK, f. 127, item 1020, item 2879, 17.

⁸⁵ IR NBUV, f. 232, item 164, 132-132v.

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Images of the Inquisition in Bulgarian Revival Culture: Periodical Press and Translated Literature

Abstract: This article examines the images of the Inquisition in the Bulgarian National Revival culture, situating them within the interplay between historical fact, literary fiction, and ideological instrumentalization. Its theoretical framework is grounded in contemporary revisionist scholarship on the phenomenon of the Inquisition, with particular emphasis on the works of Edward Peters and Henry Kamen, who underscore the distinction between the historical institution and its subsequent mythologized representations. From this methodological perspective, the study analyzes periodical publications and translated literary works through which the theme of the Inquisition entered the Bulgarian cultural sphere.

Special attention is devoted to the reception of novels such as "Beatrice Cenci" by Francesco Domenico Guerrazzi, "The Mysteries of the Inquisition" by Victor Féréal, and "Piquillo Alliaga" by Eugène Scribe, which reproduce and popularize the so-called "black legend" of the Roman and Spanish Inquisitions. The article demonstrates how these texts, mediated through translation, acquired a specific ideological function within the context of the Bulgarian ecclesiastical struggles and the polemics surrounding the Uniate movement. The Inquisition was transformed into a symbol of religious fanaticism and institutional violence, deployed as an argument against Catholic propaganda and as a means of consolidating Orthodox identity.

The study concludes that the National Revival images of the Inquisition do not merely reflect historical reality, but rather result from a complex process of cultural transfer, ideological selection, and journalistic instrumentalization. Thus, the theme functioned as a significant element in the formation of modern Bulgarian public discourse and national self-consciousness.

Keywords: *Inquisition, "black legend", periodicals, Uniate movement, Bulgarian ecclesiastical struggles, translated historical novels, Francesco Domenico Guerrazzi, Victor Féréal, Eugène Scribe*

This study aims to trace and interpret the images of the Inquisition in Bulgarian Revival culture, examining them at the intersection between historiographical discourse, literary fiction, and the contemporary social and political debates. The starting point of the analysis is Edward Peters's opinion that the Inquisition functions not only as a historical institution, but also as a culturally constructed image, formed by legends and myths that have shaped the public imagination for centuries. In this sense, the Bulgarian Revival notions of the Inquisition cannot be thought of as a direct reflection of historical reality, but should be analyzed as part of the ideological and rhetorical strategies serving specific national and confessional causes.

The focus falls on periodicals and translated novels by Western European authors, among which Francesco Domenico Guerrazzi's "Beatrice Cenci",¹ Victor Féréal's "The Mysteries of the Inquisition"² and Eugène Scribe's "Piquillo Alliaga, or the Moors under Philip III"³ occupy a central place. These narratives fit into the wider European context of the so-called "black legend" of the Roman and Spanish Inquisition, bearing the marks of the romantic and liberal anti-clerical tradition of the 19th century. However, on Bulgarian soil, they acquired additional meanings, conditioned by the struggle for ecclesiastical independence, the polemics surrounding the Uniate movement and the formation of the modern national identity.

The methodology of the study is based on contemporary historiographical revisions of the phenomenon of the Inquisition (including the works of Henry Kamen), as well as on an interdisciplinary approach combining literary-historical, receptive and discourse analyses. Particular attention is paid to the mechanisms of transfer and transformation of cultural models through translation—to the way in which Western European anti-clerical narratives are adapted in the Bulgarian Revival context and become an instrument of domestic political argumentation. From this perspective, the problem allows us to comprehend the Inquisition not only as a historical theme, but also as a significant symbolic resource in the process of building the modern Bulgarian public sphere.

The Inquisition—Between History and Myth

The Inquisition as a legal and institutional practice of medieval and Early Modern Europe is a complex historical phenomenon that continues to generate both scientific interest and persistent socio-cultural myths. The term derives from the Latin *inquisitio* (investigation) and originally denoted the process of investigating and condemning cases of heresy. In the contemporary popular consciousness, however, the concept of the Inquisition is mainly associated with obscurantism, violence, and religious fanaticism—a perception shaped by cultural memory and literary images ensuing the romantic and anti-clerical tradition of the 19th century. The theme of the Inquisition has been studied with enduring interest in art and literature since the 17th century, when various martyrdom chronicles and witness accounts, with contradictory credibility, began to fascinate readers with mysterious and terrifying plots, while also channelling various anti-Catholic and anti-clerical ideas. Later, the Gothic novel purposefully attracted attention to the Middle Ages, portraying religious fanatics such as Inquisitors and Jesuits as archetypal evil characters, who, by means of the ruthless

¹ Beatrice Cenci. Storia del secolo XVI di F. D. Guerrazzi. Pisa: Tip. Vannucchi, 1854.

² Mystères de l'inquisition et autres sociétés secrètes d'Espagne par M. V. de Féréal. Paris: P. Boizard, 1845.

³ Piquillo Alliaga, ou Les maures sous Philippe III par Eugène Scribe. Paris: Librairie de L. de Potter, 1847.

cruelty of the court, stand out against virtuous and innocent heroes subjected to inhuman torture and humiliation.

Especially influential are the so-called “cause celebri” (“causes célèbres”), which, along with novels and historical representations, form, “a collective imagination about the past of the nation and its institutions” (Mazzacane 2010: 964). This collective picture includes executions, auto-da-fé, merciless torture, and the total annihilation of the “other”, the one who thinks differently. According to Mazzacane, “the criminal justice system of the old regime is among the most frequent victims of distortions: even highly respected works are replete with eerie images of inquisitors in race, torture, gallows, and bonfires” (Mazzacane 2010: 935). The researcher draws attention to the fact that from the perspective of Enlightenment ideals, with which we think today, there is a risk of distorting our understanding of the past and hastily demonizing it. Although the use of violence by the Inquisition cannot be denied, historians insist that this practice must be interpreted in the context of the legal and religious order of its time, as well as the product of specific political, cultural, and social circumstances (Homza 2025).

One of the contemporary scholarly discussions on the subject is related to the historical revision of the Inquisition, which aims at clarifying the extent to which popular opinion reflects real practices. New revisionist research began in the 1970s with the opening of classified archives and the development of new historical methodologies, changing our knowledge of the history of the Roman and Spanish Inquisition. Among the most significant and frequently cited sources are Edward Peters’s “Inquisition” (1988) and Henry Kamen’s “The Spanish Inquisition: a Historical Revision” (1997). They seek to identify and correct widespread modern misconceptions and historical distortions about the practices of the Inquisition. The fundamental thesis of the American historian Edward Peters is as follows: “The Inquisition was an image assembled from a body of legends and myths which, between the sixteenth and the twentieth centuries, established the perceived character of inquisitorial tribunals and influenced all ensuing efforts to recover their historical reality” (Peters 1989: 122). In his seminal work, the author examines not only the institutional history of the Inquisition tribunals, but also the process of mythologized “invention” of the historical facts of the Inquisition. Peters shows how the image of a painful, ruthless institution has been constructed and embraced in the public consciousness over the centuries, including the means of literature and political critique of Catholicism in early modern times. Modern historiography tries to distinguish between primary sources (interrogation records, official decrees, court records) and later interpretations, which are often highly fragmentary or ideologically burdened. The methodological research on the collection of inquisitorial records has shown that these very documents are a complex product of the interaction between the testimony of the accused, the interpretations of the judge inquisitor, and the notary’s official note, which requires a critical approach to their use as

historical sources. In this sense, the need for a methodological rethinking of such documentary sources is increasingly justified (Pihko 2024: 166).

The historical Inquisition is a phenomenon that requires a nuanced and critical approach, rejecting the simplified and often mythologized versions that exist in popular culture. Academic research has shown that it cannot be reduced to a paradigmatic image of tyranny and fanaticism, nor can it be understood without the careful consideration of the legal, social and cultural realities of its time. The critical analysis of the sources, as well as the use of contemporary interdisciplinary approaches are fundamental to the objective historical understanding of this key institution in the religious history of Europe.

Images of the Portuguese and Spanish Inquisition in periodicals from the Bulgarian Revival Period

One of the earliest National Revival period images of the Inquisition appeared in the first Bulgarian literary magazine “Lyuboslovie” (“Philology”) in 1846, which included an anonymous literary text, defined in genre as an anecdote, and titled “Blagoroden i sveshtenoiztezatel” (“Noble and Sacred Torturer”). It exposes the cruel methods by which the inquisitors extorted false confessions from the alleged victims: “it shows purely by what means of torture men were forced to unwittingly confess and show themselves guilt for sins that they never committed” (Blagoroden i sveshtenoiztezatel 1846: 66). The story is set in Lisbon and presents a fictional episode of the deeds of the Portuguese Inquisition, without providing any references. The condemnation of the practices of the Inquisition logically resonates with a more general anti-Catholic attitude, which is also evident from the explicit reference to the Order of the Dominicans, with which the unnamed inquisitor in the story is identified. Some researchers link the topic of the Inquisition with the ongoing struggle for an independent Bulgarian church during the Bulgarian Revival, comparing the atrocities of the inquisitors with the actions of the Patriarchate of Constantinople (Aretov 2023: 143).

The topic of the Inquisition resumed with great intensity at the beginning of 1860, when anti-Catholic propaganda was associated with the growing Uniate movement in Bulgaria. In 1859, the newspaper “Balgaria” (“Bulgaria”), which supported the separation of the Bulgarian Church from the Greek Patriarchate, was launched. The periodical was funded by the French Catholic propaganda, specifically by the Order of the Lazarists. At the end of December 1860, an Act of Accession of the Bulgarian Church to the Papacy was signed. In this context a number of literary and journalistic texts appeared, aimed at strengthening the anti-Uniate arguments by recalling the sinister image of the Inquisition.

On the pages of the newspapers “Tsarigradski vestnik” (“Constantinople Newspaper”) and “Balgaria” (“Bulgaria”), a heated debate unfolded between Todor Burmov, a fighter for ecclesiastical independence, and Dragan Tsankov, the ideologue of the Uniate movement. In his accusations against Tsankov’s activities, which he described as anti-Bulgarian, Burmov used the cruelty of the

Spanish Inquisition as his main anti-Catholic argument. In order to achieve a greater propaganda effect, he regarded the Catholic Church and the Inquisition as completely identical institutions: "As much as Mr. Tsankov wants to avoid this question, he must agree with us and recognize that the Inquisition is a child born of the Papacy" (Burmov 1860: 93). Recalling the torture of the tribunals, the author aimed to "protect" the Bulgarians from Catholicism, arousing hostility and absolute intolerance of the Western rite. Among Burmov's crushing arguments was the veneration of Dominic, "the accursed inventor of this satanic system and zealous tormentor of the gentiles", as a great saint in the Roman calendar (Burmov 1860: 93). Last but not least, the author was indignant of the fact that no pope had so far condemned the atrocities of the Inquisition.⁴

The topic of the Spanish Inquisition was also covered in the magazine "Balgarski knizhitsi" ("Bulgarian Books") of the same year. Its February issue featured a text entitled "Taynostiti na svyashtenoto izpitanie" ("The Secrets of the Sacred Trial"), which presented an excerpt from the popular French novel "The Mysteries of the Inquisition", published in Bulgarian fifteen years later as an independent book volume. The extract indicated the language of the intermediary translation (Greek), the name of the author—M. V. Fereal, as well as the nationality of the original.⁵ The name of the translator was not revealed, which gave rise to a number of hypotheses among the literary historians of the later centuries. Manyo Stoyanov, for example, suggested that the translation had been the work of Nikola Mihaylovski (1818–1892), who later translated the complete two-volume edition of the novel (Stoyanov 1957: 247). Docho Lekov, in turn, admitted that the translator was Sava Dobroplodni (1820–1894). This hypothesis was based on the autobiographical elements in Vasil Drumev's novel "Uchenik i blagodeteli" ("The Student and the Benefactors"), which portrays the character of Bogdan reading a manuscript about the Inquisition translated by his teacher (Nalbantova 2001: 147). However, the real translator was most probably Iliya Blaskov (1839–1913), as the writer expressed the intention to publish the full text in his publications of the later years.

In the same year, the magazine published two other materials in translation about the Spanish and the Portuguese Inquisition. The first text, "Ispanska inkvizitsiya" ("The Spanish Inquisition"), is the only detailed historiographical study on the subject, which was published in the Renaissance periodicals. It traces the history of the judicial institution, starting with the persecution of heresies in the Middle Ages. A curious detail in this publication is its dedication to Hristo P. Tapchileshtov—a Bulgarian merchant and active participant in the movement for church independence. This fact explains the ideological goal pursued by the

⁴ Indeed, this happened quite late—on March 12, 2000, when Pope John Paul II made a public apology for the transgressions of the Catholic Church to humanity.

⁵ Victor Féréal is the pen name of the 19th century French writer Madame de Suberwick, whose work explores the themes of secret societies and the Inquisition.

translator Dimitar Bisserov, who used as his signature the acronym D. E. Y.—denouncing Catholicism and Uniatism, and consolidating Bulgarian society around its traditional Orthodoxy. The text maintains the liberal anti-clerical tendency characteristic of Europe in the 19th century, which is also evident from the abundant reference to the works of Juan Antonio Llorente, a Spanish cleric known for his ruthless criticism of the Inquisition. The translated text points to the Spanish Inquisition as the main reason for the country's decline:

The history of the Spanish Inquisition may serve as proof of the terrible influence of iniquitous state decrees on the fate and character of entire nations. The dramatic decline of Spain during the reign of Philip II, the weakening of its material and spiritual forces, the gradual coarsening and corruption of a noble and endowed by nature people were the consequences of the Inquisition court that Fernando and Isabella founded (*Ispanska inkvizitsiya* 1860: 349).

The Inquisition is the result of the religious contradictions that tore apart medieval Europe, which means that it can be viewed as a product of its age, caused by an ignorant society unaware of religious tolerance. The main reason for the success of this phenomenon is seen in the encouragement of anonymous slander which combined with various types of torture, deprived the defendants of any opportunity and hope to defend themselves. The inhuman methods accompanying the indictment are described in the so-called “*Directorium Inquisitorum*” (1376), written by the Spanish Dominican Nicholas Eymerich (c. 1316–1399), which affirmed the unlimited power of the Holy Inquisition, while torture was accepted as a legitimate part of the investigation. An external reason for establishing the Spanish Inquisition can be seen in the hatred that the population and clergy felt towards the Spanish Jews, envying their large numbers, wealth, and education (*Ispanska inkvizitsiya* 1860: 351). If someone wore better clothes on the Sabbath or dined with other Jews, this was considered sufficient proof that he respected Jewish customs, which gave the Inquisition a reason to intervene. The text refers to Llorente, according to whom the institution burned at the stake about 30,000 heretics, and the number of the accused who concluded a truce with it at the cost of their property, honor and civil rights reached 100,000 people. However, the wrath of the Inquisition was not appeased with the dead: their bones were dug up and thrown into the fire, and their property was taken from the heirs, confiscated for the benefit of the treasury. The publication also mentions the notorious Inquisitor Torquemada (1420–1498) for his cruelty, and draws attention to the large number of volunteers (about 20,000) who reported crimes against the faith, in return for some privileges they enjoyed. The text advocates the belief that the Inquisition stopped the intellectual development of Spain, citing the example of the persecution of the Spanish politician, jurist and educator Pablo Antonio de Olavide (1725–1803).

In the original text, it is suggested that readers are familiar with the “*auto da fé*” ceremony from some novels they have read. In a footnote, the translator comments on the lack of any books in Bulgarian on the subject. With the inten-

tion of compensating for “the poverty of our writing” he translated the novella “Autodafe in Lisbon in 1746”, which takes the reader to another country and era. The author of the original text “Das Auto-da-fé” is H. E. R. Belani, the pseudonym of the German lawyer and novelist Karl Ludwig Häberlin (1784–1858). The work is part of his collection of short stories and novellas “Des Beduinen Tochter: und andere Novellen und Novelletten” (Belani 1838). Under the same pseudonym, Häberlin published several earlier historical works, in which he also touched on the subject of the Inquisition.

The novella examines the fate of the forcibly converted Jews in Portugal, called the “new Christians” (Christiani novi), who secretly continued to follow the rituals of their Jewish faith. The story presents a family that falls under the crosshairs of the Inquisition after a betrayal by the so-called “semi-converted” (semi-baptized), as Jews were designated descendants of intermarriages between Jews and Christians who had a higher status in society (Auto-da-fé v Lisabon (v 1746) 1860). An elderly half-baptized Jew, Gabriel el Mejo del Cunha e Junqueiro, who had made a great fortune from the Negro trade in Africa, fell in love with a young girl, Joaquina, who was from a family of “crypto-Jews” (“hidden Jews”). When his marriage proposal was rejected and he could not acquire her father’s hidden wealth, he decided to take revenge. By pretending to be a hidden Jew, Gabriel managed to gain the trust of her father, who told him that he secretly professed the faith of his ancestors. Following the advice of his confessor, the rich old man handed over the girl, her family and her fiancé, Pedro, to the hands of the Inquisition, as a result of which they were burned at the stake.

In 1867, the newspaper “Macedonia” published an article titled “Dvoynoto ugnetenie” (“Double Oppression”). It deals with the two types of compulsion – bodily and spiritual. The deeds of the Medieval and Spanish Inquisitions are mentioned, and the assimilatory policy of the Phanariots is pointed out as an example of spiritual oppression of the Bulgarians. What is curious about this case is that the Catholic propaganda among the Bulgarians from the Svishtov and Plovdiv regions is considered as an incomparably heavier oppression. The Papacy’s aspirations to the throne of the Almighty, observed in different historical epochs, and the desire to seize both secular and spiritual power are condemned. The spirit of the Enlightenment, which frees human minds from age-old delusions, is characterized as salutary. The anonymous author reported the specific reason for the printing of the material – the recently renewed opinions in favor of the Papacy (Dvoynoto ugnetenie 1867: 2).

Two years later (1869), the Revival periodicals published announcements by Iliya Blaskov about the forthcoming publication of the novel “Taynite na Inkvizitsiyata” (“The Mysteries of the Inquisition”),⁶ which sparked off a heat-

⁶ Obyavlenie. Otechestvo 1 (15), 60; Razlichni. Otechestvo 1(17), 68.

ed debate between him and Lyuben Karavelov revealed on the pages of the newspapers “Otechestvo” (“Fatherland”) and “Svoboda” (“Freedom”). Karavelov declared that “The Mysteries of the Inquisition” was an unnecessary and untimely reading, judging only by the title of the novel. It is noteworthy that he did not know the work and resorted to guessing its author (Karavelov 1869: 47). He admitted the authorship of three famous historiographers of the Inquisition – the French journalist and politician Léonard Gallois (1789–1851), the author of the “Histoire abrégée de l’Inquisition d’Espagne” (1828), translated by the Spanish clergyman Juan Antonio Llorente, who himself was the author of a number of critical works, and the French writer Paul Féval (1816–1887), who was little known in Bulgaria as the author of the eight-volume historical work “Les tribunaux secrets: ouvrage historique” (1851–1852), the first two parts of which are devoted to the Inquisition. It must be noted that Karavelov was well acquainted with the literary output of the leading Western European intellectuals, although none of these authors had written anything titled as the mentioned work. At the same time, it is puzzling that he had not heard of the famous French novel, translated into many languages, including Russian, very soon after the original edition.

The literary image of the Roman Inquisition.

The Beatrice Cenci case

The novel “Beatrice Cenci” by the Italian writer Francesco Domenico Guerrazzi—a representative of romanticism associated with the secret society of the carbonari—was published in Bulgarian in 1867. Pursuing analogies with contemporary reality such as the persecution and repression of the Austrian authorities against the supporters of the unification of Italy, he recounts a dark episode of the practices of the Roman Inquisition in 1599. This touching story became one of the urban legends of Rome. It inspired artists of different epochs and nationalities and its plot was developed many times in the literary works of Percy Bysshe Shelley, Stendal, Alfred Nobel, Antonin Artaud, Alberto Moravia, etc.: “Transformed into a myth of trampled innocence, Beatrice has become an accusatory symbol of a system of repression” (Mazzacane 2010: 964). The sentence was carried out on the personal order of Pope Clement VIII (Ippolito Aldobrandini, 1536–1605), whose pontificate was associated with the reform of ecclesiastical rites and the defense of the dogma of papal infallibility, but most of all with the verdict of Giordano Bruno. The name of the Pope Inquisitor is also related to Bulgarian history – he was the one who restored the Sofia Catholic Bishopric in 1601 with its seat in Kiprovetz (nowadays Chiprovtsi).

At its core, Guerrazzi’s novel is a vivid denunciation of the papal institution, of anti-human justice and of the abuse of the individual in prisons. The carbonara Guerrazzi exposes the hypocritical piety of the high clergy and shows their criminal nature: “The cardinals wear a red robe, so that the blood may not be recognized by them” (Guerrazzi 1867–1868: 235). The pope himself is por-

trayed as a cruel, greedy, and treacherous schemer. He has been compared to a “marble sphinx”, and his face is “like a stone”. The novel puts forward the suggestions that God’s servants spend their time weaving black intrigues, killing innocent people, and seizing other people’s property. In their pursuit of benefit, driven by their greed and relying on their unlimited power, they plot hellish plans, violating all human laws. In his desire to present himself to Roman society as a noble and compassionate servant of God, the Pope hypocritically promised to pardon the little brother Bernardino. However, he forced him to attend the execution, and then sentenced him to life imprisonment: “The Pope thought and devised his plan as follows: either Bernardino would die in torment while watching; or if he lives while in exile, the law allows all property to be taken. Thus did the Roman high priests then forgive” (Guerrazzi 1867–1868: 271).

In the *Enciclopedia Cattolica*, the image of Pope Clement VIII is presented with a halo of holiness and religious devotion: “Clement VIII confronted the ideals of Catholic reform: not only was he a tireless worker, conscientiously attentive to detail, even when bedridden by gout, but he was also a man of deep piety and austere lifestyle. He fasted, meditated, celebrated Mass, confessed with exemplary regularity, and every month went on foot to visit the seven churches.”⁷ In the same edition we find factual and laconic account of the “Beatrice Cenci case”:

Beatrice Cenci, the daughter of Count Francesco Cenci—a violent and dissolute man – was born in Rome on February 12, 1577. Along with some relatives, she was involved in the murder of her father, which was initially presented as an accident. The ensuing investigation revealed the truth and during the trial the defendants made forcibly extracted confessions; the process was also supported by Pope Clement VIII. Ultimately, Beatrice, her brother Giacomo and her stepmother Lucrezia, were executed on September 11, 1599. Her idealized figure was represented in the fine arts (a particularly famous example is the painting attributed to Guido Reni), in music and in literature (by Percy Bysshe Shelley, Stendal, Alexandre Dumas and Alberto Moravia, among others). There are also numerous film adaptations.⁸

In another English-language Catholic Encyclopedia, the Pope is presented with an evaluative element, as is the case of Beatrice Cenci: “He was as merciless as Sixtus V in crushing out brigandage and in punishing the lawlessness of the Roman nobility. He did not even spare the youthful patricide Beatrice Cenci, over whom so many tears have been shed.”⁹

⁷ Papa Clemente VIII. In: *Cathopedia, the Catholic encyclopedia*. Available at: <https://it.cathopedia.org/wiki/Papa_Clemente_VIII> [Accessed 10 October 2025].

⁸ The Beatrice Cenci case. In: *Cathopedia, the Catholic encyclopedia*. Available at: <https://it.cathopedia.org/wiki/Papa_Clemente_VIII#II_caso_Beatrice_Cenci> [Accessed 10 October 2025].

⁹ Pope Clement VIII. In: *Catholic encyclopedia*. Available at: <<https://www.catholic.com/encyclopedia/pope-clement-viii>> [Accessed 10 October 2025].

In Guerrazzi's novel, the object of denunciation is also the Italian justice, which destroys innocent human beings. In the dungeon, when Giacomo and Bernardino say goodbye, the younger brother asks: "Tell me, brother Giacomo, you walk a lot, you see a lot, is justice like that everywhere?" The other brother answers this question only with a sigh (Guerrazzi 1867–1868: 258).

Guerrazzi paints a vivid and credible picture of inhuman torture in Roman prisons. In Chapter XVIII, in a footnote, he notes that the accounts of Beatrice's torture were drawn from life. The author even claims that he himself has been subjected to similar, and even worse atrocities, but refrains from mentioning the details, lest the reader consider them exaggerated. This confession adds a biographical element to the plot of the historical novel. The writer wants to suggest that for the past three centuries from the events of the novel to the suppression of the Carbonari Revolution, the prison regime has not changed, but continues to function with the same medieval cruelty. The Catholic Church has not evolved since the time of the Holy Inquisition.

Public dissatisfaction with the resolution of the Beatrice Cenci case is primarily related to the obvious intentions of the tribunal, guided in its decisions by material benefit. It is clear that the destruction of the family of the wealthy Count Cenci will leave his legacy in the hands of the church. The trial and execution, together with the criminal law of the Old Regime, are the subject of subsequent mythologizations, which, according to Mazzacane, "contributed significantly to the construction of the "black legend" of counter-Reformation Italy, to the obscurantism and corruption of its governments, to the blind cruelty of its justice during the 'decadence' of the Baroque era" (Mazzacane 2010: 936).

The powerful accusatory charge of the novel, directed against the highest Catholic clergy, aims to shake the confidence in the Holy Catholic Church and in God's vicar on earth. The translation of such a work, containing powerful ideological suggestions, is intended to play a certain socio-political role at a time when the disputes around the Uniate movement have not yet died down in Bulgaria. Anticipating the danger of disunity of the Bulgarians, coming from the Catholic propaganda and the struggles for and against the union, Dimitar Blaskov offers the Revival reader a work with a strong anti-Catholic and anti-papal tendency. It meets the social needs of the time in the years when the church question was among the priority socio-political problems for the Bulgarians. Declaring through his translation his categorical anti-Uniate position, Dimitar Blaskov, who favored Orthodox Christianity and the influence of the Russian empire, wants to unite the people around the traditional Orthodox faith.

The image of the Spanish Inquisition in two translated novels

The cycle of Revival texts related to the theme of the Inquisition closes with two translated French novels with plots from the Spanish Inquisition. Both translations were made by Nikola Mihaylovski and were printed in the same year—1875. One of them has already been mentioned—the translation of the

novel “The Mysteries of the Inquisition” by Victor Féréol, which was finally published in its full volume. It enjoyed wide popularity throughout Europe, partly because of its sensational character, and partly due to the powerful ideological suggestions in it. The word “mystery” in the title generally evokes a sense of unease and dread, related to unsolved crimes and obscure past events (Anastasova 2019: 10).

The action takes place in Spain in the XVI century, and the work is part of a larger cultural phenomenon—the so-called “black legend” of the Spanish Inquisition (“la leyenda negra”). This formulation denotes the tendency to consciously build a hyperbolized and manipulated image of the Inquisition, recurring in a number of works of art. Peters proposes that each nation has its “black legend,” i.e., “a collection of unfavorable images that include ethnic criticism, exaggeration of cultural institutions or traits, and isolated events drawn from their original context and elevated to the typical” (Peters 1989: 131).

The Spanish Inquisition, the successor to the medieval Papal Inquisition, was established as a state institution in 1478 by Fernando II of Aragon and Isabella of Castile to ensure that Jews¹⁰ and Muslims who converted to Catholicism during the Reconquista would not threaten religious orthodoxy. Later, its role was reduced to limiting the influence of the Reformation in the Spanish possessions. To achieve its goals, it resorted to torture, burning the convicted alive and the confiscation of their property. It was finally closed by royal decree in 1834.

The action in the novel takes place in the middle of the XVI century, mainly in Seville, during the reign of King Charles V. Most of the characters are based on real people, but the anachronism in the introduction of some main figures such as the inquisitors Pedro de Arbuez and Tomás de Torquemada, who lived in the 15th century, is impressive.

Pedro de Arbués (1441/2–1485) was a high Catholic clergyman of the Augustinian Order, who served as canon in Zaragoza (1474) and later was provincial inquisitor in the Kingdom of Aragon (1484). He was considered a model of learning and piety, studied philosophy, theology and law, and performed his duties with diligence and justice. Although the enemies of the Inquisition accused him of cruelty, there is no indisputable evidence of even a single death sentence issued by him (Allaria 1911). He was mortally wounded while praying at the altar of Our Lady in the Cathedral of La Seo in Zaragoza by hired assassins sent by the Marans he pursued. The murder provoked the emergence of a widespread movement against the Jews and tribute to his personality. In 1867 he was canonized by Pope Pius IX (Allaria 1911). The image of the inquisitor in the novel tendentiously deviates from the facts, attributing to him numerous vices almost to the point of demonization. He is the embodiment of the type of lustful inquisitor, presented in a number of literary works.

¹⁰ Jews who, after being baptized, again openly or secretly returned to Judaism, were known by the name “Marani”.

Another historical figure in the novel is Tomás de Torquemada (1420–1498), a Dominican friar and the first Castilian Grand Inquisitor of the Tribunal of the Holy Inquisition. During his reign, the Inquisition focused its efforts on preserving the purity of the Catholic faith in Spain, which was considered threatened by the numerous Marans and Moriscos who, for material reasons, officially adopted Christianity, but continued to secretly profess Judaism or Islam. Torquemada's name became a symbol of cruelty, religious intolerance and fanaticism because of the use of torture to extract confessions and the practice of burning on the stake those convicted of heresy. Torquemada's methods were in line with the efforts to preserve Christian Spain. The assessment of the extent to which they were justified must not remain outside the context of the judicial standards of the fifteenth century (Ott 1912).

The novel is filled with anti-clerical, political and moral criticism and represents a kind of political and ideological manifesto at a time when Spain (and Europe) was in a crisis between absolutism and modern liberal ideas. The author's literary strategy includes the use of sensational stories and supposedly "real testimonies" to provoke public shock and attention. At the same time, as Cuendías argues in the preface to the novel, the book also claims a precautionary function:

the author of the "The Mysteries of the Inquisition", like us, had no other purpose than to protect his country from the abuses to which the love of power of the clergy may entail – abuses which, even if they fail to throw France into the calamities from which the Spaniards have suffered for so long, can at least give rise to those hidden disagreements and internal strife – the fruit of a narrow and ill-directed education – which act like rust on social ties, embitter minds and divide them, preparing the terrible clashes between spirit and matter, in which the power and prosperity of nations are refracted (de Cuendías 1845: XIV–XV).

To a large extent, the conceptual premises of the work are provided by the fact that in most of his notes Cuendías refers to the "Histoire abrégée de l'Inquisition d'Espagne" (1823), an abridged edition of the monumental four-volume work "Histoire critique de l'Inquisition d'Espagne" (1818) by the Spanish clergyman, scientist and politician Juan Antonio Llorente (1756-1823). A former Commissioner of the Holy Inquisition and General Secretary of the Tribunal of the Inquisition, Llorente is known for his fierce criticism of the practices of the Inquisition and for his ideas of reform. His opinion that the clergy imposed the Spanish Inquisition against the will of the people and without the approval of the Spanish monarchs was adopted and promoted by the co-authors of the novel. After the death of Fernando VII (1833) and the official abolition of the Inquisition (1834), Llorente's views found fertile ground for dissemination and enjoyed wide public support. This historiographical position is closely related

to the progressive politics in Spain during the nineteenth century. Llorente's carefully provided reports on the number of victims, according to scientists, are many times overestimated (Kamen 1998: 305–320).

In the same year, Nikola Mihaylovski translated another novel that introduced the Bulgarian Revival reader to the gloomy atmosphere of the Inquisition—“Piquillo Alliaga, ou Les Maures sous Philippe III”. This is a historical novel by the French writer Eugène Scribe, originally published as a feuilleton novel in the newspaper “Le Siècle” from March 10 to September 18, 1846. It covers about a quarter of the volume of the original. The last 15th chapter of the second volume, “The Home Scene”, corresponds to the 23rd chapter of the French text, the “Scènes d'intérieur”, which contains a total of 89 chapters (Scribe 1875, Scribe 1846). Mihailovsky's intention to continue the translation of the novel is evidenced by an announcement in the newspaper “Vek” (“Century”) (Obyavleniya 1875: 4).

The dramatic events in the novel take place at the end of the 16th and the beginning of the 17th century, during the reign of the Spanish king Philip III (1578–1621). Brought up in a monastery in the worship of religion, the king complied with the decisions of the clergy and gave unlimited power to the Inquisition. One of the most fateful decisions for the country was the expulsion of the Moriscos, the baptized descendants of the Moors, settled in Spain after the end of the Reconquista. The work examines the critical situation of the Moriscos under Philip III, and the depiction of the exiles is presented in the spirit of the so-called *Moriscophilia*¹¹—a positive, often romanticized or idealizing attitude towards this minority. *Moriscophilia* is manifested mostly in French and Spanish literature of the 18th and 19th centuries, where the Moriscos are often presented as victims of religious fanaticism and political intolerance, bearers of a lost high culture, and at the same time symbolizing the exotic and the “oriental” in the context of the European romantic sensibility.

In the gloomy atmosphere of fanaticism, greed and lust for power, Scribe presents the fate of a family—that of Alami Delascar, his son Yézid and his daughter Aïxa during the exile of the Moriscos in 1609. According to his interpretation, King Philip III was in love with the virtuous and beautiful girl, and Queen Margaret of Austria had a secret attraction to Aïxa's brother. It was precisely for this reason that the decision to expel the Moriscos was repeatedly postponed. The king's confessor, Piquillo Alliaga, sympathizes with the Moriscos and defends them by resisting the great influence of their detractor, the duc de Lerma. The sensational moment is related to the revelation of the Moorish origin of Aliaga, who also turns out to be the brother of Yézid and Aïxa. The novel is a mixture of historical facts and fiction. The action takes place in the context of a credible historical situation, and some of the characters are based on real historical figures. The prototype of the main character Piquillo Alliaga

¹¹ From the Spanish word “moriscos” and the Old Greek word “Philia” (“Love, Affection”).

is the Dominican cleric Luis Aliaga, who held the position of Grand Inquisitor of Spain from 1619 to 1621, who was also a confessor and adviser to Philip III. Another real-life figure is Juan de Ribera, who was an influential figure in Spanish history, as well as archbishop and viceroy of Valencia, canonized in 1960 by Pope John XXIII. He is presented in the novel with the slightly different name Juan Ribeira.

The images of the Moriscos are extremely idealized by Scribe, who portrays this group of about half a million people as the most hard-working and wealthy inhabitants of the kingdom. They are superior to the Spaniards both physically and morally—with their good manners, wit, honor and willingness to defend their honor and dignity until the end. In the depiction of the Moriscos, Scribe sometimes goes so far as to deliberately hyperbolize the facts, regarding both their number (two million) and their importance as exemplary subjects: “they cultivated three-quarters of Andalusia, the two Castiles, the kingdom of Granada, Murcia, and even Catalonia” (Scribe 1846: 378). Moreover, his moriscophilia should be seen as a symptomatic manifestation of Western European liberalism and freethinking in the nineteenth century. This ideological attitude is characterized by a critique of religious intolerance and institutionalized fanaticism, a categorical distancing from the dominant confessional readings of the past, and a refusal to unconditionally accept the ecclesiastical interpretation of historical events. In Spain, at the same time, the official discourse continues to impose a judgmental assessment of both the Moriscos and Islam as a whole, a position that, in the French intellectual context, not only does not meet support, but also generates an opposite, sympathetic reaction. In this sense, Scribe’s moriscophilia functions not just as an aesthetic strategy, but as an ideological tool for implicit criticism of the Catholic Church and the Inquisition, fitting into the broader European discourse of the so-called “black legend” about Spain.

The Bulgarian translation of the novel, printed in the Bulgarian Printing Society “Promyshlenie” in Constantinople, provoked several reviews in the National Revival periodicals. In an announcement published in the newspaper “Vek” (“Century”), the novel was presented as a “very interesting book”, while it was reported that the first two volumes had been published long back, and the third one was expected soon. The editors recommended the book to their readers with the promise that in one of the next issues they would discuss it in detail (Obyavleniya 1875: 4).

Stefan Bobchev published his review in the magazine „Chitalishte“ (“Community Cultural Center”), where he presented his views on the pictorial possibilities, the influential power and the readability of the novel as a genre. It was defined as the most appropriate format for recounting historical events and for portraying remarkable personalities. In the context of these reflections, the author presents “Piquillo Alliaga” as a fascinating publication for the Revival reader, which would acquaint them with important details of the life of the Moors in Spain during the reign of Philip III. Nevertheless, he did not hide his

conviction that there were far more useful and suitable authors for the Bulgarian reading public to be translated—Scott, Balzac, Sand, Hugo, Carr, Goethe, Turgenev (Bobchev 1875: 271).

A few months later, the magazine “Znanie” (“Knowledge”) published an extensive review by Lyuben Karavelov, in which he defined the Spanish Inquisition as one of the most obscurantist institutions in the history of mankind:

In no dominion have rudeness, ignorance, and religious fanaticism played such important roles as they did in Spain; in no dominion has so abundant an amount of innocent blood been shed as in Spain; finally, in no other land do we encounter such terrible barbarities, such ferocious persecutions and such atrocious tortures as in Spain (Karavelov 1875: 208).

In the spirit of Scribe’s moriscophilia, he presented Jews and Arabs as bearers of “mental awakening” in line with his discoveries in the sphere of natural sciences that opposed fanaticism and superstition. According to the author, they were the innocent victims of ignorance, fiercely persecuted by the Christian Inquisition and they paid with their lives for the truth. Karavelov connected the persecution and expulsion of the Moors from Spain—honest, clever and hard-working subjects, with the deplorable current state of the kingdom. Despite the lack of critical assessment of the events, he pointed out Scribe’s impartiality as one of the main merits of the novel. The publicist saw it as useful for the Bulgarian reader, who would learn much more about the Spanish history from it than from the textbooks idealizing the personality of Philip III. At the same time, he warned that one cannot rely on the absolute historical authenticity of the facts presented in the novel, which was something a novelist could not be responsible for. In conclusion, the reviewer noted that Mikhailovsky had translated a “sufficiently useful book” (Karavelov 1875: 208).

The two translated novels illustrate how nineteenth-century authors revisited the history of the Spanish Inquisition to create romantic and dramatic adventure stories. They show how the French perceive Spain not only through the prism of the complex history of their relationship, but also with a significant dose of traditional romance and exoticism.

Conclusion

On the one hand, the images of the Inquisition presented in the Bulgarian Revival culture have an ideological function characterized by the national historical context. With their great potential for influence, they appear in a number of anti-Catholic and anti-Uniate texts in the periodicals as a vivid argument in favor of the persecuted ideological suggestions—to protect the traditionally Orthodox Bulgarians from attempts to win them over for the cause of Catholicism or Uniatism. However, on the other hand, the conceptual tasks of the Bulgarian reception also serve a more general anti-clerical tendency, which is also

observed at the pan-European level during the transition to a modern society. This ideological line is drawn through the three translated novels, the authors of which defend the principles of liberalism, humanism and freedom, characteristic of the European nineteenth century.

The outlining of the images of the Inquisition in the Bulgarian Revival culture has shown that they functioned primarily as rhetorical and ideological constructions, the purpose of which went beyond historical knowledge. In periodicals and translated fiction, the Inquisition was a universal symbol of religious fanaticism, institutionalized violence, and abuse of spiritual power. This symbolic potential was actively mobilized in the context of church struggles in order to legitimize anti-Uniate positions and consolidate the Bulgarian public around the idea of preserving the Orthodox identity.

An analysis of the reception of works such as Francesco Domenico Guerrazzi's "Beatrice Cenci", Victor Féréol's "The Mysteries of the Inquisition" and Eugène Scribe's "Piquillo Alliaga" reveals complex dynamics between fiction and fact, sensationalism and journalistic commitment. Through them, the Bulgarian Revival culture assimilated and rewrote elements of the European "black legend" about the Inquisition, inscribing them in its own ideological and national projects. Thus, translated literature seems to be something more than a passive channel for cultural transfer—it is an active tool for modeling public attitudes and constructing the image of the "other"—the Catholic West.

On a broader scale, the study confirms the need to distinguish between the historical reality of the Inquisitorial institutions and their cultural representation. The Bulgarian Revival discourse perceives and reproduces already mythologized images, which, although often remote from nuanced historiographical assessments, perform a specific social function. It is in this functionality—in the use of the past as an argument in the present – that the importance of the theme of the Inquisition as part of the process of forming the modern Bulgarian cultural and political identity is revealed.

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The Question of Toleration in Bulgarian Literary History: The Case of “Book of Three Religions” by Sofroniy Vrachanski

Abstract: The article discusses the reception of the volume “Book of Three Religions” by Sofroniy Vrachanski (1739–1813) in regard to the question of religious toleration. After an overview on the definitions of toleration and a description of the circumstances that lead to the appearance of the “Book of Three Religions”, this article delineates two main clusters of opinions on the attitude of Sofroniy Vrachanski in Bulgarian literary history during the late 20th and early 21st century. Several scholars are grouped together according to the way they interpret the volume as a gesture of toleration on the part of Sofroniy Vrachanski who was an Orthodox Christian and a bishop of Vratsa with a strong religious and political influence upon his flock. They consider this gesture as driven from his desire to know more about the religious Other and regard the volume as a step towards the appropriation of the ideas of European Enlightenment. The second group of scholars, however, does not regard the compilation of treatises on Christianity, Judaism and Islam as an expression of toleration. On the contrary, they regard Sofroniy as a political figure, and a man of letters who has proven that his goal is to provide doctrinal instruction for prevention of conversion than toleration. After the exploration of the philosophical perspectives on the notion of toleration and an overview of the Bulgarian historiography on this specific case, the present study offers argumentation in support of the position that the collection does not signify religious toleration.

Keywords: *religious toleration, Sofroniy Vrachanski, Dimitrie Cantemir, Bulgarian Revival, historiography, anti-Islamic literature*

The concept of toleration has changed its scope and application across time. The term originates from the Latin verb *tolerare*, which means “to endure, to bear and to put up with ideas or beliefs that a person might not approve”. Toleration refers to “practical implementation of social or political circumstances” whereas tolerance is rather “an abstract and theoretical aspect” that signifies efforts for acceptance and peaceful cohabitation (Simonutti 2020). More specifically, religious toleration comes at question during the so called “wars of religions” in Western Europe when inevitable coexistence of representatives of different religions under single ruling monarch required theological justification. In 16th and 17th century the debates about religious toleration stemmed from the consideration that there is one true confession and the followers of the

rival confession, be it Judaism, Islam or Christianity, can be persuaded with theological arguments instead of violence. In the context of christianization of the New World some theologians also raised voices against violent practices of proselytism. The philosophers of Early Modern Period of 17th and 18th c. developed further the concept of religious toleration. They prescribed unbiased treatment of the members of certain confession, equal treatment in the face of the law, and understanding of the logic behind the tenets of a rival religion. From the past centuries up to the present times, when modern concepts of tolerance embrace appreciation of religious diversity, there is one unchangeable feature of toleration – “it is the zero point of acceptance of the other” (Denkova 2002: 6). Toleration is neither acceptance nor neglect. It is a policy of noninterference despite one’s objection.

Scholars of toleration define a very important condition for the act of toleration—it can exist only when there is no oppression or coercion. Voluntariness is a prerequisite for toleration: “one can only speak of toleration where it is practiced *voluntarily* and is not compelled, for otherwise it would be a case of simply “suffering” or “enduring” certain things that one rejects but against which one is powerless” (Forst 2026). There are various modes of relationship between the followers of different religions which cohabitate one space. Top-down relationships or horizontal ones may occur between representatives of different religions in regard to their ability to tolerate the religious others. For instance, in the Ottoman empire Jews, Christians and Muslims were sultan’s subjects paying different taxes on the basis of their religious affiliation. The Christians and the Jews had the status of *zimmi* (*dhimmi*), which meant that they were protected by the sultan, yet they are also subordinate, not having the full set of privileges that usually the Muslims had. On the other hand, between the regular population which is divided by their religious affiliation a horizontal type of toleration can be observed. It involves religious policies of noninterference, where daily interactions for practical reasons are possible. Interactions of this kind can happen between the members of craftsmen’s guilds, between traders or between students of different religious background who study at the same educational institution (Sabev 2014).

Even before the time when the Balkan peninsula was conquered by the Ottomans, the coexistence of representatives of different religions was present in Byzantine empire. The imperial subjects were accustomed to a regime of non-curiosity about issues of theological and doctrinal nature, which concern a religion other than their own. The Bulgarian philosopher and expert in Byzantine studies Georgi Kapriev considers that “the millennial coexistence of Jews, Orthodox Christians and Muslims in the Eastern European tradition cultivates respect for the religious secrets of the other through silence” (Kapriev 2010: 255–256; Kapriev 2012: 105–114). He argues that the relationship between all these followers of diverse religious practices happened on two levels. The first level was the space of daily interactions. It included sharing food, gifts, and ap-

precipitating the festivities of their neighbours who belonged to different religions. The second level was that of theology and doctrinal teaching. Usually those very neighbours who witnessed religious festivities and received food or other gifts did not inquire about the reasons behind the festivities. Coexistence has required acceptance of the neighbour without entering the realm of the mystical and the intimate confession of the respective religion.

The hypothesis about such a regime of prevailing silence over the doctrinal teachings of the religious Other may serve as an explanation of the fact that in the Bulgarian manuscript tradition between 15th–18th century there are hardly any theological anti-Islamic works. In the early 19th century Sofroniy Vrachanski appears as the first Bulgarian writer who created a whole book of doctrinal teachings in favour of Christianity and against Judaism and Islam. It is called “The Book of Three Religions” and dates back to 1805. What could be the reasons for the Christian bishop Sofroniy Vrachanski to break the silence and inquire about the doctrines and rituals of Judaism and Islam in comparison with his own religion? Was it out of curiosity and a sense of toleration beyond daily interactions, which he had certainly experienced as an Ottoman subject? Or it was rather to provide equipment for those who need to polemicize with representatives of other religions and to prevent conversion? Was it an expression of the feeble birth of a national feeling felt by the Bulgarian bishop as a representative of the whole community? Bulgarian historiography is divided in solving these questions. There is an opinion that the whole collection of treatises on the three Abrahamic religions was a gesture of toleration. In contrast, there is an opposite opinion, that the collection “The Book of Three Religions”, and more specifically the treatise on Islam, is not driven by questions of toleration and curiosity but is based on the desire of the bishop to provide didactic tools for instruction of the literate Bulgarians.

The nature of the present study is historiographical. It contributes to the present research on Sofroniy Vrachanski and his “Book of Three Religions”, and more specifically to the humble body of research on the treatise on Islam, by creating a systematic overview of the existing opinions of Bulgarian and foreign scholars who wrote in the course of the 20th and early 21st in regard to the Sofroniy’s toleration. The innovative character of this article is to design an imaginary historiographical debate on this issue by introducing two clusters of opinions—*pro* and *against* the “toleration” drive invested in the volume. Furthermore, we will provide arguments in favor of the cluster of scholars who consider the work as a potential tool for theological instruction and a means for anti-Islamic indoctrination. Sofroniy Vrachanski was taking care for his own people, providing them with useful teachings, protecting them with the tools of diplomacy, and creating awareness among them about the present state of Bulgaria under the Ottomans—“this territory where living is barbaric and precarious”, as he describes his fatherland in his own autobiography (Vrachanski 1992: 49)

Sofroniy Vrachanski and his “Book of Three Religions”

Sofroniy Vrachanski (1739–1813) was an Ottoman subject who lived during very turbulent times of imperial reign. In the second half of the 18th century the Ottoman empire was experiencing territorial losses, local revolts on the part of the ruling elites, and formation of mountain gangs who caused unrest among the population. In such circumstances the life of priest Stoyko Vladislavov from the village of Kotel who later became Sofroniy, the bishop of Vratsa, was a difficult one. Being a Christian with higher religious rank, he needed to negotiate economic and social matters with representatives of the Ottomans and the local pashas. Undoubtedly he was also witnessing the rituals of the Muslims and, according to his autobiography, when he was running from some criminal gangs he even hid in the harem of a Muslim from the town of Pleven and lived there for about a month. The whole impression from the autobiography is that the protagonist is constantly running and hiding from danger, suffering oppression from those in power and feeling uncertainty about his life in Ottoman Rumelia. His final decision to depart from his laymen and to emigrate to Wallachia was justified with this sense of constant feeling of unrest. If we need to relate the impression from the autobiography to the above-mentioned concepts of toleration, we can easily assume that no toleration can exist in a context when a sense of oppression causes involuntary migration from one's fatherland. And even though Sofroniy Vrachanski was successful in his daily negotiations with Muslims, in his writings he was rather interested in the theological background of their beliefs.

His autobiography, “The life and Suffering of the Sinful Sofroniy” was actually part of the object of our present scholarly inquiry “The Book of Three Religions”.¹ It is the last part of the collection and discusses the daily interactions between himself as a Christian leader of the flock and the Muslims of different ranks. The question of this study, dedicated to Sofroniy Vrachanski and his collection “Book of the Three Religions”, is to what extent the author of the compilation of theological treatises on the three monotheistic Abrahamic religions is driven by toleration or his writings are rather a display of articulate condemnation and a tool for instruction. The collection dates back to 1805 and includes three translated texts and one original work. The first translation is driven mostly by the work of Peter Mogila and is entitled by Sofroniy “*Pravoslavnoe izpovedanie veriy*” (“On Christian Orthodox faith”). It prioritizes Christianity over the other two world religions. The second is a work on Judaism by Paolo Medici, entitled *Povest o vere i obichai evreiskiya* (“A Narration on Jewish Faith and Rites”). The original author was a Jew, converted to Catholicism, who so passionately embraced Christianity that eventually became a vehement refuter of Judaism. As a result, his negative attitude to the rites and customs to the Jews echoed in Sofroniy's translation into Bulgarian. The third

¹ Rossiyskaya natsionalnaya biblioteka [The National Library of Russia]—St. Petersburg, fond Mikhail Pogodin, dos. 1204.

treatise in the collections is a translation of Dimitrie Cantemir's book on Islam (Cantemir 1722). Its title in Bulgarian is *Sistima i religiya mohamedanskia* ("System and Muhammadan Religion"). The treatise contained both theological perspectives and descriptions of religious practices of the Muslims, which the Moldavian prince Dimitrie Cantemir had witnessed when he had been living in the Ottoman capital in his youth. Despite his understanding of the logic behind certain Muslim rites and his admiration of the Arabic and Ottoman language, he still preserved the antagonistic Christian point of view that Islam is untruthful and its prophet Muhammad is a false one. Subsequently, Sofroniy followed this opinion and further intensified the critical notes from the original, adding his original comments and expressions. Lastly, Sofroniy Vrachanski added his autobiography *Zhitie i stradaniya greshnago Sofronia* ("Life and sufferings of the sinful Sofroniy"), which is the only fully original piece in the manuscript, and later became one of the key texts in the ideological construction of the Bulgarian National Revival.

Toleration or Anti-Islamic attitude: Sofroniy Vrachanski's translation of "*Sistima i religiya mohamedanskia*"

In this part of the article we will reflect more specifically on the reasons behind the inclusion of the treatise on Islam in the collection "The Book of Three Religions". There is a pending need for an answer to the question why the translation of Dimitrie Cantemir's "Kniga sistima" stands solely as the only work on Islam in Bulgarian that is known from the 18th century. It is obviously an act of "breaking the silence" of interreligious relationship, and also one that does not describe only rituals and rites but one that is interested in the life of the prophet Muhammad and in the theological aspects of this religion.

Speaking of the Bulgarian manuscript tradition prior to the National Revival period one can find religious antagonism especially towards Islam in certain hagiographical texts and scattered miscellanea but not in the form of translated or original treatises in Slavic language. It is worth pointing out for instance, that polemic debates exist on the pages of the hagiographical texts about neomartyrs which Sofroniy Vrachanski had known and listed in his copies of Paisiy Hilendarski's "Slavonic-Bulgarian History" (Romanski 1938). In addition, there are also certain notes left by copyists of religious collections of sermons about conversions of Bulgarians to Islam. An appropriate example about such accounts are the anti-Islamic excerpts in the collections of sermons by the Bulgarian writer Yosif Bradati, who was a contemporary of Paisiy Hilendarski and Sofroniy Vrachanski (Angelov 1969: 58–60). However, the above-mentioned examples are just fragments of larger works and not full treatises, as „*Sistima i religiya mohamedanskia*".

A possible reason, which stands behind the translation of Cantemir's work, can be the development of Sofroniy's identity not only as a writer but also as a bishop and a politician. Perhaps for the first time in many centuries he

was appointed officially to act as a defender of the interests of the Bulgarians and his whole collection of treatises in defense of Christianity together with his autobiography are signs of the desire to overcome Ottoman oppression with the help of the Russian empire. When he was in Wallachia (1803–1813) he entered pro-Russian circles of local governing families, such as that of Konstantinos Ypsilantis who welcomed him and paid his debt to the Ecumenical Patriarchate in Constantinople. He also developed a favorable attitude to the Russians in the context of the complex diplomatic relations in the Russian-Turkish war 1806–1812. As an Orthodox Christian and a representative of the Slavic and Bulgarian population Sofroniy was an important strategic partner of the Russians. He responded to their calls for collaboration in several letters to high-rank Russian military men and diplomats that are well-known to the historians of this period (Mitev, Racheva 2013). In addition, in 1810 he issued proclamations to his fellow Bulgarians to assist the Russian army along its invasion in the lands on the south bank of river Danube. Although these documents are from a later period, it is possible that Sofroniy Vrachanski's sympathy for the Russians had started even prior to his emigration to Bucharest when he was still in Vratsa and Vidin (Zlatarski 1923: 3–85). Instead of toleration, the treatise on Islam, and the collection as a whole can be regarded as a possible tool for instruction of Bulgarian priests and monks of the dangers of rival Abrahamic religions and a display of Sofroniy's competence as a theologian but also as a politician. This, of course is just a hypothesis because we still do not know the exact reason for which Sofroniy Vrachanski wrote the whole collection besides his statement at the very end of his autobiography that he wants to write a few books "in favor of his fellow-Bulgarians". However, judging by the tone of the autobiography, some scholars suppose that the text might have been used for official justification of Sofroniy's stay away from his flock in Bulgaria (Vrachanski 1992: 357). If we regard the autobiography as integral part of the collection "Book of Three Religions" we can consider it as an effort for justification of his emigration to Bucharest and as an initial stance of his pro-Russian and anti-Ottoman political inclination which grew considerably in the following years since the treatise had been written in 1805.

The scarcity of previous such works about Christian-Muslim relations, written by Bulgarians, can partly be explained with the above-mentioned silence towards the dogmas of rival religions. It is an unspoken policy of non-interference in the practice of the neighbors which Sofroniy Vrachanski breaks. If we follow the arguments of the group of scholars who consider him tolerant, then we can envision him as an enlightened person who wants to discover not only modern ways of writing, such as the genre of autobiography, but also other genres who are in accordance with the Christian-Orthodox doctrinal regime but are an expression of the birth of the spirit of Enlightenment. Yet again, if we take as an example the treatise on Islam, it is obvious that the translation itself does not display so much curiosity and thirst for knowledge but rather disdain and ob-

jection. At the same period when thinkers of the European Enlightenment, such as George Sale and Voltaire call for tolerance and praise Muhammad as “one of the great men of world history” (Tolan 2019: 156), Sofroniy Vrachanski creates a collection which adheres rather to the medieval Byzantine anti-Islamic tradition of John of Damascus, Theophanous The Confessor, Euthymios Zigabenos and others (Ribolov 2016: 17–29). Even at one point when he is retelling the life of the Prophet he writes that he will refer to the “Greek version of the story” before returning again to the way it was retold in the original treatise by Dimitrie Cantemir (Sofroniy: f. 185 v – f.187 r).

Sofroniy Vrachanski—a tolerant enlightened scholar?

It seems that the grouping of the opinions of the previous scholars who have worked on the treatise on Islam and the collection “The Book of Three Religions” can be done according to one basic criteria—whether the scholars consider Sofroniy Vrachanski a modern enlightenment figure or whether they regard his contribution as a continuation of a medieval tradition that, despite certain linguistic and context-specific elements, still remains vivid in his attitude towards Islam and Judaism. In order to reach a conclusion, let us first present the opinions of several scholars who connect Sofroniy’s efforts to the Enlightenment project.

When he writes about the Bulgarian literary and historical development in relation to the Enlightenment, Emil Georgiev speaks of Sofroniy Vrachanski as tolerant to other religions. This image fits to Georgiev’s main thesis that National Revival is a period of merging “Renaissance manifestations with Enlightenment ones (Georgiev 1973: 204). In an attempt to present the Enlightenment as “an ideological struggle of the progressive classes against the outdated feudal order,” he focuses on the advancement of education and culture and examines the traces of Enlightenment ideas in Bulgarian literature. In particular, in “The Book of the Three Religions”, he regards Sofroniy Vrachanski as an Enlightenment figure who attempts to raise the level of education of the people and who resembles to Dositej Obradović and Gotthold Lessing in his expression of toleration. He argues as follows:

If we point out the example of Bulgarian Jews, Armenians, and other peoples, Sofroniy Vrachanski departs from the medieval tradition that places Christians, and especially Orthodox Christians in our country, above all others, and converges with a kind of tolerance that is characteristic of the period of the Enlightenment. In addition to the Orthodox religion, he is interested in the Jewish and Muslim religion, as becomes evident from his work – translated and compiled – “Confession of the Orthodox Christian Faith and the Customs and Laws of the Jewish and Muslim Religions and Conditions,” in which he sets out not only the principles of the Orthodox religion, but also those of the two other most important religions in Europe and the Middle

East, in our country and in our neighbourhood, as an effort to introduce them to the Bulgarian readers. In this way, this man-of-the-Revival-period resembles Dositej Obradović, who notes that in “our age” religion is irrelevant, or Lessing, who in his famous drama “Nathan the Wise” puts an emphasis not on the confession of faith but on the moral value of those who profess it. (Georgiev 1973: 210).

Emil Georgiev embraces the hypothesis of Sophroniy Vachanski as a kind of proto-Enlightenment figure in Bulgarian culture which is driven by knowledge seeking and acceptance of the others as contributors to the nation’s wellbeing. Even if one can distinguish Sofroniy’s curiosity for the rites and rituals of the religious others, one cannot underestimate his negative commentaries of the Prophet of Islam as a false prophet and his followers as deceived and unwise people. One can see such commentaries as conclusions to the original fragments, which Sofroniy Vrachanski adds to Cantemir’s narration (Alexandrova 2024: 121–138).

Another literary historian who envisions Sofroniy as an enlightened scholar is Lyudmila Boeva (Boeva 2004: 51–79). She examines this writer in relation to Russian-Bulgarian ties in her article “Russian Literature in the Life and Work of Sofroniy Vrachanski” and shares that Sofroniy Vrachanski is relatively tolerant in matters of religion. Boeva claims that “Orthodox chauvinism” is not practiced by Sofroniy and that he sympathises equally with poor Bulgarian and the poor Turks. Ludmila Boeva makes another effort to present Sofroniy Vrachanski as a kind of Bulgarian philosopher who “tries to understand the essence of the three faiths in a philosophical and calm manner, placing science above all else” (Boeva 2004: 69).

The researcher has made remarkable contributions to the study of Russian culture and folklore from the Early modern period. She also demonstrates knowledge of numerous works on Sofroniy Vrachanski from 18th and early 19th century, putting a special emphasis on his last and most fruitful period of life in Bucharest. However, she too seems tempted to over interpret Sofroniy’s writings as a kind of curiosity for comparative theology. Ludmila Boeva refrains from taking a firm position, calling him “relatively tolerant” towards Judaism and Islam, but does not indicate with whom else she would compare him as being more intolerant. She derives much of her argumentation from Sofroniy’s autobiography referring to those passages where the protagonist describes a mass condition of turmoil both to Christians and to Muslims, or praises his skill to negotiate with the Muslims he meets and for winning the disputes with them. However, the fact that he negotiates with people of other faiths on a daily basis and receives help from them does not mean that he expresses religious toleration towards Islam in his writings. She provides no examples from the religious treatises themselves. Perhaps it would indeed be extreme to call his attitude “Orthodox chauvinism,” and we agree with Ludmila Boeva on that. Yet, repeatedly, the Bulgarian bishop tries to defend his own religion as true, drawing his arguments

from the initial statements of Dimitrie Cantemir himself, who used included in the treatise a lot of obscenities, scandalous sexual practices and gossips in order to degrade the Mohammadan religions and its followers. In our opinion, Sofroniy agreed and in his own stylistic way harshened Cantemir's descriptions either exclamations, commentaries and stylistic shifts from high theological style to colloquial one with abundance of obscene words in the descriptions of same-sex relations between Muslims, or their polygamy.

The Bulgarian expert in the Revival period Nikolay Aretov also claims that "The Book of Three Religions" is a manifestation of the toleration in several of his studies (Aretov 2013; Aretov 2017). He pays much attention to the concept of religious toleration and calls it "the most essential aspect of tolerance", highlighting its fundamental characteristic: "knowledge of the other and interest in it". Aretov provides a whole spectrum of attitudes to the Other that represent nuances in the performance of tolerance—from ignorance and hostile rejection, to disinterest, to enlightened curiosity and finally to toleration—an attitude that rejects the superiority of one's "own privileged uniqueness". In the introduction to the section of his book on "The Book of Three Religions," where he discusses the need to recognise and distinguish the subtle nuances in the position of the other towards us, he gives credit to an important Bulgarian collection in the field of social and cultural studies from the 1990s, which discusses the notion of "The Other" in the Balkans and is edited by Nadya Danova (Aretov 2017: 69–70; Danova 1995).

Nikolay Aretov's observations on the lack of tradition before and after Sofroniy Vrachanski with regard to such a scale in the consideration of other Abrahamic religions are valuable. He points out that in the Middle Ages, all otherness was subsumed under the genre of polemics against heretics, and after his book of 1805, there were rarely any works of this nature, let alone those presented together in a collection. He highlights Catholics, Protestants, and even the Greek clergy from a certain point onward as "religious others" for Bulgarians during the Revival period, but Muslims rarely become the subject of non-literary depictions (if we exclude the 16th-century example of the Catholic writer of Bulgarian origin Krastyu Peikich who wrote the polemic treatise "Mahometanus"). Aretov himself believes that Emil Georgiev's point of view that Sofroniy Vrachanski was enlightened and tolerant cannot be dismissed easily. Nikolay Aretov seeks chronology of Sofroniy Vrachanski's toleration and finds it in his earlier collection of manuscripts, called "Filosofskie mudrosti" (Philosophical Wisdom) (Aretov 2017: 76). He agrees with scholars who have compared Cantemir's treatise on Islam with previous anti-Islamic texts and had found it a more favourable in its attitude towards Islam. Indeed, Dimitrie Cantemir's "Kniga sistima" possesses such tolerant attitude in some of its observations when the Moldavian prince writes with appreciation, respect and nostalgia about his life in Constantinople the people he met there, and about his studies and his teachers. Then Nikolay Aretov goes a step further, presupposing that Sofroniy Vra-

chanski copies this attitude in “The Book of Three Religions”. He concludes with a rhetorical question: “what else but such an idea could put the three religions on an equal footing with each other” (Aretov 2017: 82). He acknowledges Olga Todorova’s opposing view that Sofroniy’s articulate denouncement of the religious Other is closer to the “medieval polemical tradition”, but he is clearly unwilling to accept it. He is not convinced even by Sofroniy Vrachanski’s own comments, which clearly display his unwillingness to accept the beliefs and rituals of the Muslims. To conclude his observations, Aretov argues that, in addition to the layer of overt affirmation of Orthodox Christianity in relation to Cantemir’s work, Sofroniy Vrachanski provides the text with another “subversive, undermining stream” that emphasises commonalities and refuses to rank the different civilisations in terms of value. This stream brings about new impulses in the perception of the Other that can lead to acceptance and toleration in the later decades of the 19th century.

Critique on Sofroniy Vrachanski’s Toleration

There are several critics and historians who have expressed their objection to the identity of Sofroniy Vrachanski as a tolerant scholar towards other Abrahamic religions. As was already mentioned, Olga Todorova was opposing Nikolay Aretov’s opinion that Sofroniy Vrachanski is a tolerant modern thinker towards Islam. In addition, some foreign scholars have also refuted the idea of toleration when it comes to Sofroniy’s collection of manuscripts from 1805. These are the Romanian researcher and translator Anca Irina Ionescu who criticises Emil Georgiev’s thesis, and the Russian historian Tatyana Kopreeva who also discusses the structure and the formal characteristics of “Book of Three Religions” as early as the late 1960s.

Together with Virgil Căndea, Anca Irina Ionescu was part of a team that has researched the Bulgarian translation in as much as it includes also adaptations of Dimitrie Cantemir’s “Kniga sistema ili sostoyanie mohamedanskoi religii” (Căndea, Ionescu 1987). In a couple of instances, Anca Ionescu shares her observations that Sofroniy Vrachanski’s motive for providing Bulgarians with accurate and comprehensive information about the three main religions practised in his homeland was to highlight the superiority of Christianity. She believes that Sofroniy Vrachanski was motivated by political considerations because he feared of conversion of his compatriots to the “Muhammadan religion”. In her opinion, Sofroniy Vrachanski is passionate in his struggles to draw the attention of his readers to the indisputable superiority of Christianity over the other Abrahamic religions. She disagrees with Emil Georgiev’s thesis, saying that “in this sense, we cannot agree with the opinion of Emil Georgiev, who believes that through this work, Sofroniy Vrachanski distances himself from the medieval tradition, which places Christians as superior, and resorts to the characteristic of “tolerance” from the Age of Enlightenment” (Ionescu 1977: 104).

Similar view is shared by the Russian scholar Tatyana Kopreeva whose

studies have been translated in Bulgarian in the 1990s (Kopreeva 1996). She defines Sophroniy's interventions in the original work during the process of translation as a desire to strengthen the emotional character of the compilation and provoke similar emotional reaction in his readers. Sofroniy's comments, especially in the part about Islam, are perhaps meant to be read aloud, infers Kopreeva. She also finds internal logic between the third treatise "Sistima i religia muhamedanskia" and the autobiography, suggesting that Sofroniy Vrachanski might have been influenced by Dimitrie Cantemir's eloquence and talent to narrate ironic and amusing stories. Furthermore, she suggests that the style of the original might have inspired Sofroniy to write his own adventures with the Ottomans in an autobiographical form.

Olga Todorova's view is similar to those of Anka-Irina Ionescu and Tatyana Kopreeva. She is a Bulgarian historian in Ottoman studies and an expert in interreligious connections between Muslims, Jews and Christians in the Bulgarian and Balkan context during the Ottoman rule. In her article on "The Book of Three Religions" she considers Sofroniy Vrachanski's idea of presenting the postulates of the three Abrahamic religions in simple Bulgarian language as containing "an enlightening sparkle" (Todorova 2013: 236). However, she rejects the writer's attitude towards Islam or Judaism as "enlightened" and prefers to associate the collection with the medieval tradition of refutations. In an important footnote, she cites part of the discussion on this issue in critical works to date, rejecting Ludmila Boeva's claim as "unjustified or at least exaggerated to a great extent" (Todorova 2013: 236). Olga Todorova belongs to the circle of scholars who do not regard it as an attempt at tolerance and recognition of the foundations of other religions. Knowing the views of the traditional clerical intelligentsia of the late 18th century, Todorova believes that Sofroniy Vrachanski himself was willing to learn about other religions but not with the presumption of acceptance or toleration but with a rather conservative and didactic cause—to provide the Bulgarians with a comparative theological reading. She also refers to the most famous text from the collection—"The Life and Sufferings of the Sinful Sofroniy" as an expression of the prevailing sense of oppression of the ottomans over the Christians than as a text which can display politics of toleration (Todorova 2013: 248).

In conclusion, our own opinion, which was partially expressed above, is inclined in favour of the position of those scholars who are critical of Sofroniy Vrachanski's toleration in "The Book of Three Religions". We derive arguments both from the initially proposed definitions of toleration and from the textual source itself. On the one hand, if voluntariness is a general characteristics of religious toleration, then we notice that neither towards Sofroniy's autobiography, nor towards his treatise on Islam there is voluntariness on the part of those who need to be tolerant to Islam. Rather, Sofroniy Vrachanski uses every occasion to enact the discourse of oppression and to envision the Christians in the Balkans as victims of an aggressor who belongs to the "Muhammadan religion". On the

other hand, Sofroniy Vrachanski's translation of the treatise includes several types of original entries that represent his negative attitude towards the subject of his translation. They can be found in the foreword, in the commentaries to Cantemir's text, and in several autonomous longer fragments, that Sofroniy included to illustrate better some cases, initially written by Cantemir. For instance, Sofroniy adds a version of the life of the Prophet Muhammad, which he has driven from some "Greek history", and when he describes the burial rites of the Muslim he remembers a legend that is full of superstitions about ghosts and demons that he mocks repetitively. We have discussed in details these original entries elsewhere (Alexandrova 2024: 121–138) and therefore will not go into details in the present article.

Our own research on "*Sistema i religia mohamedanskia*" in view of the whole volume "*The Book of Three Religions*" proves the opinion of those scholars who do not attribute to Sofroniy Vrachanski any unconscious or conscious toleration. We support the statement that the collection is designed with the intention to serve the purposes of teaching about the dogmas and the practice of other religions. As a final touch to this discussion, we believe that during his time in Bucharest, Sofroniy Vrachanski was influenced not so much by the ideas of Western Enlightenment but rather of another hybrid ideological platform, that was grounded in the traditions of Eastern Orthodoxy. As was mentioned above, he was part of Phanariote circles in Wallachia. He also established close connections with Russian diplomats and generals, who contributed to his belief of the messianic role of the Russian empire to the Christians and the Slavic peoples in the Balkans. Sofroniy Vrachanski can be regarded as part of a discourse of counter reaction to the Ottoman empire and the birth of a revolutionary sparkle, that would eventually lead to the Greek revolution, and later to the Bulgarian revolutionary movement (Kitromilides 1994; Masower 2023). In this train of thoughts, his collection of religious treatises and his autobiography are an effort for breaking a thousand years long "silence" towards the rival religions in an attempt to link Christianity with the struggle against Ottoman rule. Even if one can still regard the revolutions in Europe as born from the spirit of Enlightenment, in the local Balkan context the attitude towards the preservation of Christianity was rooted in a post-Byzantine conservative approach that did not necessarily connect enlightening knowledge with toleration of diverse beliefs and religious orders, which were practiced in the vast Ottoman imperial territory. Indeed, in Sofroniy Vrachanski's writings we can see some kind of "enlightenment sparkle" along the lines of learning and configuring one's national identity. However, gaining knowledge about others and oneself does not presuppose an attitude of religious toleration. In contrast, religious identity becomes an ingredient of the national one and thus other confessions are regarded as dangerous.

In this way, we do not reject Sofroniy Vrachanski's image as a modern Bulgarian writer with regard to his innovations towards language and his experimentation with new genres. Just in the specific case of "*The Book of Three Religions*",

and especially with regard to Islam, we consider him not tolerant but rather hostile in his efforts to coin the Bulgarian national identity as consisting of several elements—a Christian-Orthodox, a Slavic, and an ethnic Bulgarian one.

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Educational Efforts of American Missionaries Among Bulgarians in the Nineteenth Century¹

Abstract: This paper examines the efforts of American missionaries in the nineteenth century to support Bulgarian education through the translation and publication of primers, textbooks, grammars, and other books; the establishment of schools for boys and girls; and the sponsorship of Bulgarian students studying abroad. It explores the networks established by individual missionaries of the American Board of Commissioners for Foreign Missions and the Methodist Episcopal Church with Bulgarian teachers and educators, as well as the influence these relationships had on increasing literacy among the local population prior to the Liberation. The study also argues that missionary educational activity functioned as a structured process of cultural transfer, in which translation, print culture, and institutional networks contributed to the standardisation of the Bulgarian literary language, the formation of educational practices, and the shaping of value systems. The study also considers the role of missionaries as lecturers in foreign educational institutions, where they contributed to the training of future Bulgarian teachers in various disciplines.

Key words: *American missionaries, Bulgarian National Revival, education, translation, print culture, cultural transfer, textbooks*

Language, Translation, and the Formation of a Literary Standard

The educational activity of American missionaries among Bulgarians in the nineteenth century can be understood as a significant mechanism of cultural and linguistic transformation that extends beyond the immediate aims of religious outreach. Their presence in the European territories of the Ottoman Empire has long been recognised as a key factor in the cultural and educational development of the Bulgarian population. Representatives of the American Board of Commissioners for Foreign Missions (ABCFM) and the Methodist Episcopal Church (MEC) initiated a wide range of activities, including the translation and publication of textbooks and religious literature, the establishment of schools, and the support of Bulgarian students studying abroad.

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While these efforts have been the subject of considerable scholarly attention, they have most often been examined within institutional or denominational frameworks, with a tendency to analyse the activities of the two missionary organisations separately². As Nikolay Aretov has observed, such approaches often reflect inherited interpretative frameworks shaped by earlier ideological emphases (Aretov 1991: 21). This study argues that the educational activity of American missionaries among Bulgarians should be understood not merely as a by-product of religious outreach, but as a structured cultural project that contributed to the standardisation of the Bulgarian literary language, the formation of modern educational practices, and the shaping of value systems. In particular, the paper emphasises the intersections between the ABCFM and the MEC, demonstrating that their efforts operated through shared strategies and overlapping networks that have not been sufficiently analysed in existing scholarship.

Methodologically, the study adopts an interdisciplinary approach, combining elements of intellectual history, history of education, and translation studies. It also draws on the concept of the textbook as an instrument of cultural and value formation, which allows for a shift from a descriptive account of missionary activity towards an analysis of the mechanisms through which knowledge, norms, and linguistic models were transmitted and internalised. From this perspective, translation, print culture, and educational institutions are examined not as separate domains, but as interconnected components of a broader system of cultural transfer. By focusing on the interaction between texts, institutions, and networks, the study advances a more integrated interpretation of the mechanisms through which missionary activity shaped Bulgarian education and cultural development during the National Revival.

In order to be effective, the missionaries first set about learning the local language—as a means of gaining a deeper understanding of the culture of the societies to which they were sent. Some of them progressed quickly in mastering the Bulgarian language. They even expressed a desire to translate treatises, stories, and works of fiction with moral lessons themselves—A. Long, C. Morse, J. Clark, E. Riggs, arguing that there was a particular need for religious readings for the Bulgarians and that this need grew with each passing day³. The only difficulty lay in the lack of a printing base in territories with a predominantly Bulgarian population. The missionaries from MEC attempted to assist in setting up a printing house in Tarnovo in 1861, but even with the support of the American diplomatic mission in Constantinople, they did not succeed. They “raised the question of the printing house before the central authorities, as a result of which the Sublime Porte declared that it

² See: Nestorova 1991; Lalev, Laleva 2001; Ilchev, Mitev 2003; Kulichev 2008; Hristov 1982; Genov 2008; Pileva 2023; Vasileva 2025.

³ *Seventh Annual Report* 1860, pp. 26–27.

would soon issue the necessary document⁴,” which, however, never reached Tarnovo (Yakimov 2003: 79–80). Beyond the production of texts, missionary activity relied on diverse channels of circulation through which printed materials reached wider audiences.

Print Culture and the Circulation of Knowledge

In the early 1860s, missionaries from the American Board founded a Christian bookshop in Philippopolis, and in 1862, they signed a contract with Hristo G. Danov for the distribution of evangelical literature prepared and printed by missionary organisations and collaborated with him in publishing teaching aids (see Vasileva 2025: 170). The Uzundzhovo Fair was another opportunity for them to offer translated, well-bound, and carefully designed books and brochures, and their participation “to some extent connected the Bulgarian Revival with the great American and English literature” (Gramatikov 2014: 203). In addition, the missionaries organised a network of traveling booksellers, including some Bulgarians (G. Iliev, N. Boyadzhiev, N. Slavov, S. Kurdov, P. Borikov), most of whom distributed letters and illegal appeals in connection with the preparation of the Bulgarian uprisings. The names of Dr Albert Long and Wesley Prettyman appear in the lists of contributors to Dobri Voinikov’s *Collection of Miscellaneous Works* (1860) (Voinikov 1860: 231) and are associated with other literary and educational initiatives.

Soon after familiarising themselves with the language and literature of the Bulgarians, the missionaries themselves began to print grammars, textbooks, and works of fiction in Bulgarian, actively using the printing bases of the American Board. The first brochures translated into Bulgarian were printed in Izmir (now Smyrna) in the 1840s with the assistance of Dr Elias Riggs—a missionary of the ABCFM who was familiar not only with the language but also with Bulgarian history and folklore. He also assisted K. Fotinov in publishing the first Bulgarian magazine *Lyuboslovie* (1842–44). The British and Foreign Bible Society carried out several partial translations of the New Testament by various writers, as well as successive editions of the entire New Testament that were translated by church father Neofit Rilski and published in Izmir. This represented the first significant translation into modern Bulgarian, making the biblical text accessible to a wide readership. After the relocation of the missionary printing base to Istanbul (1853) and the opening of American missions for Bulgarians (1857–58), the volume of translated and distributed Protestant literature increased significantly. Although the missionaries encountered indifference to spiritual matters among many Bulgarians, interest in biblical books, pamphlets, and tracts gradually grew. They were also widely purchased due to their affordability and accessibility.

⁴ The translation of the quotes from Bulgarian authors here and below are mine – M. P.

Textbooks and Educational Practice as Instruments of Cultural Modelling

The annual reports of the ABCFM and the MEC document the trends in missionary book production in the Bulgarian language during the nineteenth century. Tatyana Nestorova has offered an in-depth analysis of the data contained in these reports (Nestorova 1991). They reflect the dynamics of the introduction of educational and religious texts through recorded print runs. In 1867, for example, the New Testament was published at a circulation of 5,000 copies, the magazine *Zornitsa*⁵ at 2,000 copies, *Hymns* at 3,000, *Goodel's Sermons* at 3,000; and various brochures at 3,000 copies each, amounting to over 40,000 copies, comprising more than three million pages⁶. Behind these figures lay extensive translation and editorial work. In addition to translating works of various genres, the missionaries also wrote a substantial number of original texts. Moreover, when their translated and original works are examined chronologically, it becomes evident that they made a significant contribution to the development of literary genres in Bulgarian literature. Dr Elias Riggs and Dr Albert Long played the most prominent roles in this process.

Riggs, together with the established Bulgarian scholar Konstantin Fotinov, compiled *Notes on the Grammar of the Bulgarian Language* (1844)—the same year that Ivan Bogorov's *First Bulgarian Grammar* was printed. Charles Morse studied Bulgarian with Dragan Tsankov and prepared his *Grammar of the Bulgarian Language* (1859) on the basis of material from Tsankov's German grammar, as well as *An English and Bulgarian Vocabulary in Two Parts* (1860), prepared with the assistance of Konstantin Vasiliev. These publications constituted a valuable source of systematised material on the Bulgarian language and served as a bridge towards the formation of a literary language on a broad East Bulgarian basis. As one of the missionaries noted, "The Bulgarian language was used in almost all churches and schools, and textbooks—some of them written by missionaries—were printed in almost all subjects at both lower and upper levels" (Clarke 1872: 362–364. See also: Zlatkov 2003: 146–177).

For the needs of their schools, missionaries translated American and other textbooks and authored new ones, including *A Primary Book for Children* (1860), widely used in Bulgarian primary schools, as well as textbooks in grammar, physiology, algebra, moral philosophy, and other disciplines⁷. This publish-

⁵ The magazine *Zornitsa* began publishing in 1864 and was one of the first to include materials for children and students—boys and girls. See Pileva 2023: 223. Later, in 1876, a newspaper with the same name started being published.

⁶ 57th Annual Report 1867: 23.

⁷ *Grammar* (1866); *Collection for the Study of the Old Bulgarian Language* (1866); *A Primary Book of Anatomy and Physiology with 95 Figures* (1867); *Calculator for Mental Calculation in Public Schools* (1868); *First Reader* (1868); *Practical Algebra for Students in Secondary Schools* (1868); *Brief Principles of Moral Philosophy* (1869); *History of the Christian Church* (1876); *Philosophy of Mind* (1886).

ing activity not only expanded the availability of educational materials, but also introduced new ways of structuring and organising knowledge.

In this context, textbooks and translated materials can be interpreted as instruments of cultural and value formation rather than as neutral educational tools. As Michael Apple argues, school knowledge reflects a “selective tradition” through which certain meanings and values are legitimised while others are marginalised (Apple 2004: 5–6). Similarly, Ivor Goodson shows that curricular knowledge is historically constructed and shaped by specific social and institutional contexts (Goodson 1988: 17, 19). This perspective highlights the role of textbooks as products of cultural selection rather than neutral pedagogical tools. Applied to the Bulgarian context, this perspective suggests that missionary textbooks and translated materials did not merely transmit knowledge, but actively structured the ways in which that knowledge was organised, interpreted, and internalised. Through the selection of subjects, the systematisation of content, and the integration of moral and practical instruction, these texts contributed to the formation of linguistic norms, cultural values, and models of educated behaviour. In this sense, missionary educational activity can be understood not as a secondary aspect of religious outreach, but as a structured process of cultural modelling, in which translation, pedagogy, and print culture operated as interconnected mechanisms of influence.

This broader interpretative framework also helps to explain the gradual reduction of prejudices against missionary activity, as educational practices proved to be more readily accepted than overt religious preaching, particularly in a context where demand for modern education was already strongly articulated.

The translations of treatises and works of fiction produced by missionaries should be understood not merely as contributions to Bulgarian language and literature, but as instruments of cultural mediation. Through the systematic introduction of moral narratives, didactic structures, and practical knowledge, these texts embedded specific value systems within emerging reading practices. The purpose of treatises was to elevate spiritual culture, and they were used in the study of the Bulgarian language in schools (Wiener 1898: 39). “Since religious texts precede literary ones, it can be assumed that literature develops from them, preserving something of the essence of the Holy Scriptures” (Aretov 1995–96: 12–14). In translated short stories and novels, published mainly in Bulgarian periodicals and rarely as independent editions, ideas initially formulated in treatises and pamphlets were further developed at a higher artistic level. This function becomes particularly visible in the thematic consistency of translated materials—emphasis on discipline, family ethics, and applied knowledge—which aligned with broader nineteenth-century pedagogical models. The translation of works of fiction “also fulfilled, at least until the Liberation, a primarily didactic function: it introduced a genre previously unfamiliar to our literature and sought to cultivate a demand for it” (Trendafilov 1996: 15).

The work of the missionaries also included translations of poems and hymns. James F. Clark was primarily engaged in education and introduced singing with musical notation at the school of Joakim Gruev in Plovdiv. Dr Long and Dr Riggs published couple of hymn collections of central importance for Bulgarian hymnology, the first of which was *Sacred Songs with Rules for Singing* (1866), printed several years before the appearance of the first Bulgarian manuals on word formation and subsequently reprinted at regular intervals. Over time, these editions were expanded and enriched with musical notation.

Biblical Translation and Educational Networks

The greatest achievement in the educational efforts of the American missionaries was their participation in the translation of the Bible, although its significance was recognised relatively late within the Bulgarian cultural environment.

Over the past three decades, interest in the Bible and religious themes in Bulgarian literature has increased significantly, which is related, firstly, to the liberation of science from the ideology of the totalitarian regime and the resulting attempts to revalue the cultural heritage, secondly – to the introduction of new literary approaches, including the postmodern discovery of the peripheries (Drzewiecka 2017: 3).

The correspondence of the British and American Bible Societies demonstrates the missionary understanding of the importance of translating the Bible into a living, spoken language. Dr Riggs was among the first American missionaries to travel across the European territories of the Ottoman Empire and to identify the presence of a substantial Bulgarian population within its borders. During one of his journeys with T. Byington in 1859—from Thessaloniki via the Rila Monastery to Stara Zagora—after numerous meetings and discussions with clergymen, teachers, and writers, the East Bulgarian dialect was selected as the basis for the new translation of the Bible. This decision was clearly not arbitrary, but the outcome of sustained and careful observation of linguistic developments. Riggs himself, a linguist fluent in Hebrew, Greek, Armenian, Turkish, Bulgarian, and other languages, researched various Bulgarian dialects, monitored the state of spelling and grammatical norms, and closely followed the evolution of the language. He also recognised the Bulgarians' strong commitment to education: "they give their hard-earned money not to buy Bibles that will gather dust, but to study" (Amerikanski patepisi 2001: 16).

Together with Dr Albert Long, Riggs assembled the team of translators, which included P. R. Slaveykov and Hristodul Sichan-Nikolov (Tomov 1909: 47). The publication of the complete biblical text in 1871 represents one of the most significant outcomes of missionary linguistic and educational efforts. Its importance lies not only in making religious texts accessible, but in establishing a stable linguistic model through repeated circulation and broad

readership. By consistently employing an East Bulgarian dialect base and reinforcing it through successive editions, the translation contributed to the consolidation of a literary standard. In this sense, the Bible functioned simultaneously as a religious text and as a linguistic authority, mediating between regional variation and the emerging need for a unified literary language. As Stoyan Mihaylovski observed, “The Bulgarian translation of the Bible—an edition produced by an English society—is the most literate book we have in our language” (Mihaylovski 1893: 433). Ivan Vazov devoted an entire article to the subject, entitled “On the Meaning of Religion and the Bible” (Vazov 1922: 13). Pencho Slaveykov likewise emphasised the linguistic impact of the biblical translation, noting that:

What occurred elsewhere—for example, in Germany—also occurred here: the translation of the Bible put an end to linguistic disorder, to the struggle of various dialects for supremacy, and established a literary language⁸. After the appearance of the Bible in 1871, disputes among the various Bulgarian dialects subsided, and Eastern Bulgarian became the common language of all those engaged in intellectual and national life (Slaveykov 1923: 440).

The prominent Bulgarian theologian and biblical scholar Ivan Markovski later acknowledged that, “in the absence of a more authoritative and refined Bulgarian translation until the beginning of 1926, the so-called “Protestant” translation had played a crucial role in disseminating the Word of God among the Bulgarian people. Its religious significance, particularly during the period of the National Revival, was indisputable, and its linguistic contribution is no less substantial” (Markovski 1926–1927: 16). In addition, according to the contemporary researcher of the language of the Bible, D. Ivanova, “the most prominent builders and reformers of the literary language frequently found themselves in the role of translators of the Bible, and in this sense, the concept of a common literary language was closely connected with the issue of the language of biblical translations. One or another linguistic concept underwent its practical validation through biblical translation” (Ivanova 2010: 33).

Dr Albert Long continued his editorial and proofreading work on subsequent editions of the Bible and its individual parts—more than twenty in total—until the end of the nineteenth century. Dr Elias Riggs, for his part, turned

⁸ *Istoriya na balgarskata literatura* from 1966, however, disputes this part of the statement: “It is obvious that Pencho Slaveykov got carried away here—by analogy with the role that the translation of the Bible in a much earlier era played in the history of the German literary language” (See *Istoriya* 1966: 298). But church historian Hristo Hristov returns to what Pencho Slaveykov stated and confirms it: “This most important and major literary work of the Revival put an end to the linguistic unrest and marked the future development of the literary Bulgarian language” (Hristov 1981: 230).

⁹ Referring to the translation of Riggs, Long, Slaveikov and Kostovich from 1871.

to the translation of biblical reference works, including *Dictionary of the Holy Scriptures* (1882, 1884), *Concordance of the Four Gospels* (1888), and the three-volume *Commentary on the New Testament* (1894–1898). Alongside their work on biblical translation, these two missionaries associated with the ABCFM and the MEC published the children's magazine *Zornitsa* from 1864 (modeled on the Armenian *Avedaper* and the Greek *Angelophoros*) and the newspaper *Zornitsa* from 1876. Both periodicals included original and translated materials by missionaries and Bulgarian authors on biblical and contemporary topics, reflecting the state of Bulgarian literature, language, and education, and regularly announcing newly published books and textbooks. The magazine *Zornitsa* featured articles encouraging reading and education, and emphasising the importance of mothers and children in society—efforts that supported the emergence of Bulgarian women's associations. As noted in the *Annual Report of the ABCFM*, “periodicals were regarded as the greatest success of American Protestant initiatives, carrying out missionary work where no other institution could do so, reaching hundreds of homes that no Protestant could otherwise reach.”¹⁰

All efforts were directed at the enlightenment of the Bulgarians, reflecting the belief that through acquired knowledge Protestant ideas would spontaneously penetrate their consciousness. This enlightenment was conceived as not only spiritual but also practical, bringing tangible changes and improvements to the everyday lives of the local population (Vasileva 2025: 115 – 116).

While print and translation formed essential mechanisms of influence, missionary efforts also extended into the establishment of educational institutions, where their impact encountered both opportunities and resistance.

Educational Institutions and the Limits of Missionary Influence

Less successful than their literary activity were the missionaries' attempts to send Bulgarian students to study abroad and to open missionary schools in cities with a predominantly Bulgarian population. The resistance encountered by missionary initiatives reveals that their educational activity was not perceived as ideologically neutral. Opposition from local *chorbadjii* and clergies actively encouraged by the Patriarchate of Constantinople and the Russian Vice-Consulate in Varna (See Pileva 2024), was not directed solely against religious influence, but against a broader model of cultural transformation embedded in missionary education. Efforts to prevent the establishment of schools or the sending of students abroad indicate an awareness of education as a site of influence and control. For example, after the teacher Nikola Batsarov learned of the intentions of Albert Long and Wesley Prettyman to open a school in Shumla¹¹, he prepared a speech

¹⁰ Annual Report of ABCFM 1878: 24, cited in Vasileva 2025: 118.

¹¹ Now Shumen.

opposing them, even expressing the view that they should “be exterminated from among us as soon as possible...” (Batsarov 1896: 85, 134). Archival materials from the Russian Vice-Consulate document reports directed against the missionaries and strategies for counteracting their influence, including instructions to send letters to the Shumen *chorbadjii* urging them to take measures against the opening of a school in their city, as well as against the ‘threatening danger’ of sending Bulgarian students from Shumen and Kotel to the Protestant school in Malta.¹² As a result, the concerted efforts of the Russian vice-consul and the Shumen *chorbadjii* effectively thwarted the attempt to establish a missionary school in the city and discouraged several families from sending their sons to Malta. Two students who had already departed were persuaded to return. Instead, they were offered education at a local secondary school supported by the municipality or the opportunity to study in Russia (Pileva 2023: 311).

In 1861, the Methodist Mission opened a school in Tulcea, which, however, was aimed primarily for Russian and German immigrants, while Bulgarians constituted a minority among its pupils. Only after the Liberation did the Methodist Mission succeed in establishing a school for girls in Troyan (1880), later relocating it to Lovech (1881) (See Lalev, Laleva 2001), as well as a literary-theological school in Svishtov (1882), which was subsequently transformed into a theological seminary and moved to Ruse in 1894. These educational institutions acquired a strong reputation and offered instruction in both general education subjects and the basic principles of Christian faith and life. Notably, even in anonymous critical texts about missionary educational efforts, it was acknowledged that “there is not one among the proselytes who does not know how to read and write. As soon as someone joins them, even if he grew up in the forest, after three or four months, you will see him reading and writing” (Protestant-skite misioneri v Balgaria 1875: 4).

Missionaries of the ABCFM also observed that a large proportion of the more educated Bulgarians “worshipped education”, while at the same time showing little interest in “spiritual values”, and that they “clearly intended to receive from us as much secular and as little religious education as possible”¹³. The overall impact of missionary activity can therefore be more accurately characterised as cultural rather than strictly religious. At the request of prominent Bulgarians in Constantinople, the missionaries were invited to open a girls’ school in Plovdiv. In October 1860, the first Protestant school for boys was founded in the city, followed in September 1863 by a school for girls in Stara Zagora, for which the first female missionaries—Mary Reynolds and Fanny Meisner—arrived to assume leadership. The two schools were subsequently transferred to Samokov, which the American Board deliberately developed into the principal centre of its missionary activity. Protestant educators did not emphasise a strict

¹² Letter to the consul from 4.10.1862. See Mirchev 1967: 160.

¹³ Letters from T. Byington to Dr Anderson from 1861 and 1863. See Nestorova 1991: 51.

opposition “between the religious and the secular, between the traditional and the modern, between science and faith,” (Petrov 2009: 211) they placed particular emphasis on the natural sciences—physics, chemistry, astronomy, and physiology—as well as on modern didactic teaching tools. Despite initial resistance to missionary schools, these institutions gradually established their place within the Bulgarian cultural sphere. After a series of transformations, curricular revisions, and relocations, the widely recognised American College in Sofia was founded in 1926, bringing together and reorganising the earlier schools for boys and girls that had operated in Samokov.

One of the foreign educational institutions that admitted boys from the Orient at reduced fees or free of charge, often with missionary assistance, was the English Protestant College in Malta. With the support of Albert Long and Wesley Prettyman, and despite local opposition, several Bulgarian students were sent there from Shumen in 1858, including Nikola Stoychev and Todor Dzhubarov, as well as Stoyan Nikolov from Elena; Petar Mateev and Stefan Tomov from Kotel; Dimitar Vitanov and Ivan Slaveykov from Tryavna; and Dimitar H. Ivanov from Sliven. Bulgarian students integrated successfully into the academic environment of the Malta college and acquired considerable interdisciplinary knowledge, along with a solid grounding in the Holy Scriptures. As one of these students noted, “those missionaries, in their desire to help Bulgarian children receive a European education and upbringing, and then devote themselves to the education of their compatriots, they had a noble thought of facilitating the admission of Bulgarians to this college” (Mateev 2014: 26).

After the college in Malta closed in 1865, six of its Bulgarian students continued their education at Robert College, together with four other compatriots, on the recommendation of Albert Long, who was appointed Professor of Natural Sciences there in 1872. Most of them were either employed at the college or admitted with scholarships and reduced tuition fees. In addition, the American Women’s Board of Missions established a Home School (also known as the Constantinople Home) in 1871. This institution gradually evolved into the American College for Women in 1890, widely known as the “Women’s Robert College” (see Vasileva 2025: 97–99).

Both missionary educational institutions in Constantinople, which provided a modern Western education, acquired considerable authority within Bulgarian society. Students from various towns and villages sought admission, and available data indicate that approximately 150 Bulgarians studied at Robert College prior to the Liberation, while after that the number rose to over 760 (Sabev 2019: 146). The success of its graduates is evident in their subsequent careers as prominent politicians, members of parliament, diplomats, merchants, entrepreneurs, teachers, doctors, and lawyers. Five of them served as members of the Constituent National Assembly. The educators at the college succeeded in fostering a strong sense of national responsibility in their students and in passing on the ideals of the educational mission to subsequent generations. These ex-

amples illustrate the broader impact of missionary educational networks beyond the immediate sphere of religious activity.

The celebration of the feast of Saints Cyril and Methodius on the 11th of May¹⁴ emerged as one of the priorities at Robert College, largely due to the significant number of Bulgarian students enrolled there and owing in particular to the efforts of Albert Long, who lived and worked among them for many years. Reports of these celebrations appeared regularly in Bulgarian periodicals from as early as 1868.¹⁵ In 1872, the newspaper *Macedonia* described the atmosphere of the celebration near the Golden Horn and the Bosphorus, noting that “both are among the most beautiful places in Constantinople and both bear witness each year on the eleventh of May to a pleasing spectacle, for some years now they have been visited by our Bulgarians, who gather there to celebrate.” Each year, the college also dispatched official representatives to honour Exarch Anthim I. And upon the announcement that the Bulgarian exarch had celebrated a divine service together with all the other bishops, the “indescribable” joy and “long, powerful exclamations” in the choir by the college students are noted—an event widely perceived as symbolically significant within Bulgarian society (Tarzhestvovaniyata na 11-Maya 1872: 35).

Against this background, the interpretation found in the academic *History of Bulgaria* published in 1954 appears to be markedly tendentious. There it was claimed that “for propaganda purposes, the American school Robert College was opened in Constantinople” and that the institution willingly admitted the sons of the Bulgarian bourgeoisie, who allegedly played a reactionary role in the national liberation movement and cultivated a restrained attitude towards Western European science and the idea of gradual, peaceful progress (Istoriya na Balgaria 1954: 350).

However, the popularity of these Constantinople-based educational institutions among Bulgarians, as noted by O. Sabev,

was due to their distinctive atmosphere. Imbued with a Christian spirit, yet without the overt imposition of Protestantism (as they were not institutionally bound to a specific missionary organisation), they offered students a greater sense of comfort. In contrast, Greek schools under the authority of the Patriarchate of Constantinople actively pursued the Hellenisation of students from other national backgrounds (Sabev 2019: 146).

From this perspective, the Protestant educational model appears comparatively restrained and adaptive. While firmly grounded in Christian values, it large-

¹⁴ The Day of Saints Cyril and Methodius is celebrated on May 11th according to the old style, or May 24th according to the new style.

¹⁵ See (Nachov [1925]: 154). Nachov cited articles from newspaper *Macedonia* II, 25; III, 35, which briefly reported on the holiday. In subsequent years, articles about May 11th were also included.

ly avoided coercive religious instruction and instead prioritised broad intellectual development. This approach stands in marked contrast to educational systems that sought to instrumentalise schooling for confessional or national assimilation.

A comparison between the measured approach of most Protestant missionaries to Bulgarian education, enlightenment, and culture and subsequent or contemporary attempts to impose religious instruction reveals significant differences in their educational philosophy. This relative restraint is evidenced by the absence of compulsory conversion practices, the openness of institutions to students of different backgrounds, and the prioritisation of general education subjects over strictly confessional instruction.

Conclusion

The analysis presented in this study demonstrates that the educational activity of American missionaries among Bulgarians in the nineteenth century cannot be adequately understood within a narrowly defined religious or institutional framework. Rather, it functioned as a structured and multifaceted process of cultural transfer, in which translation, print culture, and educational institutions operated in close interaction. Translations and publications of textbooks, grammars, and literary works not only facilitated the dissemination of knowledge, but also contributed to the establishment of linguistic norms and the formation of reading practices. At the same time, missionary schools and educational networks introduced new pedagogical models, emphasising systematisation, accessibility, and practical knowledge. Within this framework, textbooks and translated materials can be interpreted as instruments of value formation, shaping both intellectual habits and social expectations. The relatively limited success of Protestant conversion, contrasted with the lasting impact in the fields of education, publishing, and language development, further supports the argument that the missionary contribution was predominantly cultural in its effects. Resistance from local representatives and ecclesiastical authorities, in turn, indicates that missionary education was perceived as a form of cultural influence rather than as a purely religious initiative. Examining the intersections between the American Board of Commissioners for Foreign Missions and the Methodist Episcopal Church, the study highlights the importance of shared strategies and overlapping networks, which have often been overlooked in existing scholarship.

The main contribution of this study lies in its integrative analytical framework, which connects cultural transfer with processes of value formation and allows these interactions to be interpreted in a more systematic way. By foregrounding textbooks, translation, and institutional networks as interconnected mechanisms, the paper offers a more comprehensive interpretation of missionary influence on Bulgarian education and cultural modernisation. From this perspective, the missionary project can be situated within broader nineteenth-century processes, in which education and print culture played a central role in

shaping modern cultural and intellectual frameworks. This historical experience also provides a useful point of comparison for contemporary discussions on the relationship between education, cultural influence, and value formation, without, however, extending beyond the primary scope of the present study.

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Promoting Francophonie. Missionary Education and Philanthropy

Abstract: By the late nineteenth century, the major commercial centers of the Eastern Mediterranean had become focal points of intense competition among the European Great Powers. This rivalry was not confined to economic interests alone but also sought to extend political and cultural influence over local populations.

In this context, catholic missionary activity played a crucial role in Thessaloniki and Macedonia. The arrival of the *Sisters of Charity* (*Sœurs de la Charité*), and of the *De La Salle Brothers* (*Frères des Écoles chrétiennes*) aimed at the establishment of a catholic missionary network in the fields of healthcare and education.

The provision of missionary services, encompassing education, medical care, and social welfare, presented French diplomacy with a valuable opportunity to advance its broader strategic objectives. Beginning in 1888, the French consulate in Thessaloniki initiated systematic financial support for the activities of missionary congregations operating in the city. This support continued even after the official separation of State and Church in 1905 in France, and well into the period after the end of the First World War.

This article argues that such diplomatic backing of the missionary activity, and particularly the funding of initiatives promoting French language and culture, constituted a deliberate political strategy on the part of the French state. France sought to reinforce its presence in regions where it had traditionally exercised cultural and political influence. Language functioned as a primary instrument in this strategy, with Francophonie encompassing a broad range of initiatives designed to disseminate French culture and values. Given that medical care was not a state-driven initiative, the role of missionary institutions, such as the French hospital by the *Sisters of Charity* proved particularly significant in this domain.

Keywords: *Missionaries, education, health-care, French diplomacy, Francophonie*

Introduction¹

At the end of the 19th beginning of the 20th centuries, Thessaloniki met all the criteria of what would be considered a Levant port. Like Alexandria, Beirut and Smyrna, Thessaloniki was a crossroads of trade and commerce in the Balkans, a booming market, a place where the blend of different cultures and languages was obvious, and where Greeks, Jews, Turks, and Europeans lived

¹ I would like to thank the anonymous reviewers and the editors for the insightful comments and critique towards improving my manuscript.

together and prospered (Mansel 2010: 176–178). In the case of Thessaloniki, we had the combination of a thriving port and of three different railway lines that connected Thessaloniki with Europe and Constantinople, the Ottoman Empire's capital (Mazower 2005: 224–231). However, even developed and an enclave of great social and economic mobility, Thessaloniki couldn't avoid the semi-colonial context. Its imports exceeded by far its exports (Issawi 1980: 103–104) and the foreign control over its basic infrastructure by European capital siphoned the local economy into a dependency scheme (Srougo 2013: 423). Unable to repay its international debts the *Sublime Porte* officially surrendered its tax revenues to its foreign creditors through the establishment in 1881 of the *Ottoman Public Debt Administration* (Quataert 2005: 72). The latter constituted a huge bureaucratic organization largely controlled by foreign banks and Ottoman bondholders.

France was the main European power to consolidate its prolonged ties and influence within the Ottoman Empire. As a matter of fact, France was the first to develop relations with the Ottomans following their dynamic emergence onto the European stage. The French succeeded in signing the first capitulations in 1535. This alliance between France and the Ottoman Empire, perceived by other Europeans as both peculiar and irreverent, enabled France to achieve commercial dominance and to consolidate its presence in the ports of the Levant (Mansel 2010: 17–23). As the most Christian power in Europe, France assumed the protection of Europeans within Ottoman territories, and particularly of Catholics. From 1673 onward, with the new provisions of the capitulations, French catholic religious orders expanded throughout the Ottoman Empire, establishing missions and founding churches. At the same time, the presence of French diplomatic representatives facilitated closer contact and mutual support between consuls and the leaders of the monastic orders. In 1685 the French were the first to establish a consulate in Thessaloniki (Mazower 2005: 162–163). A few years later, in 1693, the first Jesuit monks settled there and built the city's first catholic church. In 1782 they were replaced by the Lazarist order (Svoronos 1996: 91, 184–186). When the Bulgarian Church (the *Exarchate*) was created in 1870, breaking away from the *Ecumenical Patriarchate* of Constantinople, the *Lazarists* became the primary agents of catholic proselytizing efforts in the Macedonian territories. The Slavic-speaking populations were regarded as possessing a fluid religious consciousness and as particularly susceptible to conversion. The *Lazarists* promoted the Uniate model, that is, the application of the catholic doctrine combined with elements of orthodox ritual, and established a boarding school for Slavic-speaking students at their monastery in Zeitenlik, in present-day Stavroupoli, on the western outskirts of Thessaloniki (Anastasiadou 2008: 67–68, 111; Megas, Andriotakis 2004: 164–165; Bouroutis 2018: 51–52).

This paper's main hypothesis is that the French missionaries' activities in Thessaloniki and in the geographical region of Macedonia had a significant impact in the social scale through the establishment of schools, orphanages – soup kitchens, hospitals and primary medical care. In the paper I argue that

the missionary operation was closely tied with the French diplomatic mission that funded the various missionary activities over a significant depth of time. Moreover, it will be evident that the cooperation and funding of the various missionary activities by the *Quai d'Orsay* (the *ministry of Foreign Affairs*, Paris, France), continued beside the internal developments and the official separation of the State and the Church in France in 1905.

Methodologically this paper uses primary archival material in order to show first, the cooperation between the French state and the missionary networks and second, the successful penetration of the missionaries in the different ethnic communities in the region and the substantial support in crucial sectors such as health and welfare. For this endeavor, I rely mainly on the archives of the French consulate of Thessaloniki that are preserved in the diplomatic archives of the *French ministry of Foreign Affairs* (*Ministere des Affaires Etrangeres, Archives Diplomatiques*, Nantes).

For the better placing of my arguments, I segment this paper into three sections. The first, highlights the French consulate's activities and the funding of the various missionary initiatives over the course of time. The second, unfolds the educational network structured over time by the French missionaries and the participation of the various ethnic and religious communities in French schooling. Here, I will mainly focus, for reasons of the paper's length limitations, in the activities of the *Sisters of Charity* (*Sœurs de la Charité*). The third section, elaborates in the philanthropic initiatives by the *Sisters of Charity* in terms of public health offering in both the Ottoman period and the period after the incorporation of Thessaloniki to the Greek state. After all, the missionary activities for decades had a substantial impact supporting the French factor and promoting Francophonie. At the time frame we are referring to, there was an undoubted acknowledgment of the French language predominance as the *lingua franca* of the modern world. French was the language spoken in the diplomatic liaisons, the merchant tongue for doing business, the preferred language of the bourgeois in their relations and their contacts and much important in our case, the language that dominated education. French diplomats along with French missionaries had the aim to strengthen Francophonie in a win-win approach, amid the rising competition of the European powers.

The French official presence and the missionaries

Developments within France itself, particularly the French Revolution in 1789, placed catholic monastic orders in a precarious position. Beyond the monarchy, the revolutionaries directed their attacks at the Catholic Church, which possessed scandalous privileges and considerable wealth. Expulsion from public life in France and persecution led to an intensification of the missionaries' presence in other parts of the world, and especially in the Ottoman Empire. What is particularly noteworthy, and will be demonstrated below, is that while within France the monastic orders had lost their privileges and the secular authorities maintained a clear distance from

religious power, abroad French diplomatic policy and its local representatives (ambassadors and consuls) supported and reinforced their activities (Bouroutis 2018: 53). In Thessaloniki, this is confirmed by the dense correspondence preserved from 1876 onward between the Lazarist monks and the French consul in the city.²

The close cooperation between the French diplomatic authorities and the monastic orders in Thessaloniki and more broadly in the geographical region of Macedonia during this period, mainly included financial support for their activities, as documented in the relevant archival material. Alongside their extensive contacts with the French state through diplomatic missions, the monastic orders also maintained close relations with the official Catholic Church in Rome. In particular, there exists abundant correspondence from the *Lazarists* concerning issues related to catholic propaganda among Slavic-speaking populations and the presence of Bulgarians in Thessaloniki.³ In essence, the monastic orders pursued a dual strategy: formal relations and funding from the French state by *Quai d'Orsay* for their social (hospitals, orphanages, etc.) and educational activities, and communication and financial support from Rome for religious as well as social initiatives, including economic assistance to Slavic-speaking communities. To give an example on the latter, Abbot Bonetti received 3,000 French francs (hereafter FFr) from Rome to establish a school in the town of Grevena.⁴ Grevena, a town in Macedonia, today part of Greece, was a considerable outpost of Vlachs and the Lazarist monks had intense proselytizing activity in the population.

The relationship between French diplomacy and catholic monastic orders is considered especially significant given that it unfolded at a time when debates over the official separation of Church and State in France had reached their peak, culminating in the legislation of 1905 (Burrows 1986: 130). Equally contentious was the issue of removing monastic orders from public life in general in France, and from education in particular. However, as it would be evident in this paper, this “divorce” between the two spheres did not apply abroad. One may reasonably question the causes of this seemingly contradictory policy. The explanation is straightforward: French monastic orders maintained a strong presence in various regions of the world and achieved deep penetration into local societies through a wide range of activities, from the establishment of schools to major social interventions such as orphanages, boarding schools, and of particular relevance to this article, hospitals. At a time when the Ottoman authorities had developed little, if any, public welfare infrastructure, catholic

² Ministère des Affaires Etrangères, Archives Diplomatiques—Nantes [Diplomatic Archives—Nantes], (hereafter MAE-CADN), Fond Salonique Consulat/Serie B/604PO/B/83, Ambassade de France à Constantinople au Consul de France à Thessalonique, Péra, 18 mars 1876.

³ Archivio Segreto Vaticano—Vaticano [Vatican Secret Archive—Vatican], (hereafter ASV), Archivio delegato Turchia, Busta B53/f 206, Lettera di Lazaro Mlandenov per l'istituzione di una chiesa bulgara a Salonico, Salonico, 14 agosto 1887.

⁴ ASV—Vaticano, Busta B40/f 148, 1883–1887, Ufficio Propaganda del fide, Finanziamento di 3.000 franchi francesi all'abate Bonetti per la costruzione di una scuola a Grevena, Roma (senza data).

orders effectively substituted for the state by providing care and assistance to the needy. All of these initiatives bore a distinctly French imprint and reinforced French preeminence. Through the missionary schools, French culture, language and influence were likewise promoted.

For the above reasons the French consulate in Thessaloniki every year sent a detailed report to the *Quai d'Orsay* with the proposed subvention for each missionary establishment. The subvention list was accompanied with a brief note for each establishment and its activities. For instance, in 1894 the *Sisters of Charity* founded another school (Kalamarie) in the upscale Hamidiye (Kalamaria) neighborhood on the eastern side of Thessaloniki. As it is evident in the following table, the French consulate also proposed subventions for schools in the neighboring areas such as Kavala and Monastir (at present Bitola). Although Monastir school had few pupils, the subvention was high, since Monastir was a military and economic outpost for the Ottomans in the Balkan territories and the French wanted to expand their influence.

Table n. 1 – French State Subsidies (in FFr)⁵

Institution	1892	1893	1894	1895	1896
Brothers School (Frères)	3500	3000	6000	4400	4400
Sisters of Charity School	1000	1000	1000	1000	1000
Zeitenlik Boarding School	200	200	200	200	200
Lazarist School, Kavala	300	300	1000	300	600
Lazarist Monastir	500	500		500	500
Total	5,500	5,000	8,200	6,400	7,700

In the following years, the French state's subventions increased since the activities of the missionaries expanded. Beside the boys' school by the *Brothers*, a parish school for needy children was established. For the *Sisters of Charity*, the French consulate subvention provisioned both activities of the nuns in the center of the city, the school and the hospital, as also for the new school on the eastern side. Noteworthy, is that the consulate also provisioned subvention for the catholic church, located in Frangon street, in the same compound with the consulate's premises as also with the *Sisters of Charity* activities. Since France

⁵ For the school year 1892: MAE-CADN – Nantes, Fonds Salonique Consulat/Series B/604PO/B/83, Ministère des Affaires étrangères, Direction des affaires politiques, au consul à Thessalonique De Lacretelle, Financement des établissements scolaires et internats à Thessalonique, Paris, 20 juillet 1892. For the school years 1893 and 1894: Ambassade de France, Proposition de financement des écoles à Thessalonique, Constantinople, 3 novembre 1893. For the school years 1895 and 1896: Ambassade de France, Financement des écoles à Thessalonique, Constantinople, 25 février 1896.

was the protector of the Catholics in the Ottoman Empire, it wanted to confirm its predominance in religious affairs at a time frame where Italian missionaries expanded their activities in the Orient. Moreover, in an internal memorandum by *Quai d'Orsay* concerning the funding for the school year 1903–1904, it is noted that, despite the reduction in the ministry's available appropriations, a particular effort was made to avoid cuts to the subsidies allocated to schools in Macedonia, owing to the difficult conditions prevailing there.⁶ At the time the memorandum was issued (October 1903), political developments in Thessaloniki and in Macedonia more generally were highly unfavorable. In Thessaloniki itself, the bombing campaign carried out in April 1903 by the Bulgarian anarchist group known as the 'Boatmen' (Varkarides), targeting foreign economic interests, primarily French but also broader multinational interests, had caused considerable unrest, as well as significant reprisals against the Christian population (Moskov 1978: 143–145; Megas 1994). A few months later, in the summer of 1903, the Ilinden uprising erupted in the Macedonian provinces; it was violently suppressed by the Ottomans and generated even greater difficulties, further confirming the political instability prevailing in the geographical region of Macedonia (Aarbakke 2003: 111–116; Svolopoulos 1986: 186–212).

Table n. 2 – French State Subsidies⁷

Institution	1899–00	1900–01	1903–04	1904–05
Brothers School (Frères)	4400	4400	4000	4000
Parish school (Frères)			1000	1000
Sisters of Charity School and hospital	2000	2000	2000	2000
Zeitenlik Boarding School	300	1000	400	400
Sisters of Charity School Kalamarie	200	200	200	200
Catholic church	1000			
Religious expenses (Frais de culte)	200	200	200	200

⁶ MAE-CADN—Nantes, *ibid*, Direction des Affaires politiques, au consul de France à Thessalonique, Steeg, Subventions aux institutions de Thessalonique, Paris, 18 octobre 1903.

⁷ For the school year 1899–1900: MAE-CADN—Nantes, *ibid*, Ministère des Affaires étrangères au consul de France à Thessalonique, Steeg, Subventions aux établissements/institutions éducatifs de Thessalonique, Paris, 6 décembre 1899. For the school year 1900–1901, *ibid.*, Subventions aux institutions de Thessalonique, Paris, 16 octobre 1900. For the school year 1903–1904, *ibid.*, Ministère des Affaires étrangères, Direction des Affaires politiques, au consul de France à Thessalonique, Steeg, Subventions aux institutions de Thessalonique, Paris, 18 octobre 1903. For the school year 1904–1905, *ibid.*, Subventions aux institutions de Thessalonique, Paris, 14 octobre 1904.

Lazarist School, Kavala	600	600	600	600
Lazarist Monastir	1500	1500	1000	1000
Sisters of Charity School Monastir			1000	1000
Total	10,200	9,900	10,400	10,400

However, the most crucial moment in the cooperation between the French consulate and the missionaries was when the official separation of State and Church in France took place in 1905. Anyone would expect that the subventions for missionaries would stop, especially when the organization of *Mission laïque* was founded in Paris in 1902.⁸ Under the auspices of the *French ministries of Public Education and of Colonies*, *Mission laïque*'s main scope was the development of French secular education abroad, especially in the French colonies and in areas of strategic importance like the Orient.⁹ In April 1906, the secretary general of *Mission laïque* Maurice Kuhn came to Thessaloniki with main scope the reorganization of the non-religious French schools of the city. Absorbing the *Guiraud Commercial School*, its *Girls' Secondary School*, and the *Petit Lycée* of the Frenchman Thierry, *Mission laïque* established its first schools in Thessaloniki in 1906.¹⁰ For its first year of operation it received more than 20,000 FFr along with an extra 25,000 FFr for the purchase of a plot to house the Lyceum and the Commercial school of *Mission laïque*.¹¹ In its second year of operation it already had a high enrollment of 410 pupils.¹² This was a clear indication of the successful operation by the French missionaries promoting Francophonie, as also by *Alliance Israélite Universelle*, a French-Jewish organization that established schools in the thriving Jewish community of the city (Molho 2013: 147–150; Naar 2016: 22, 147–148; Bouroutis 2019: 72–73). The concept of laïcité gradually became almost universally accepted among French citizens, including members of the Catholic Church. Experiencing greater freedom from state interference in cultural matters once the government had fully severed its former catholic ties, we had a renewed religious engagement of prominent figures in literature and intellectual life in France. It also acted as a catalyst for the more active participation of women in religious life, particularly in initiatives related to social solidarity and charitable work. (Botouropoulou 2022: 14).

⁸ Archives de la Mission laïque—Paris [Archives of the Mission laïque—Paris], *Revue de l'Enseignement Colonial*, no. 6, Paris, France. This publication constituted the main educational journal for the activities of the Mission laïque worldwide

⁹ Ibid.

¹⁰ MAE-CADN—Nantes, Serie B/604PO/B/87, Rapport sur l'enseignement laïque français a Salonique, Annexe I, Thessalonique, 14 mai 1906.

¹¹ Ibid., Annexe V.

¹² MAE-CADN—Nantes, Serie B/604PO/B/83, Allocations aux Etablissements Laïques et Religieux, Paris, 31 octobre 1908.

The critical point, however, after the introduction of the French secular education abroad, was what would happen with the missionary activities funding. As we witness in the following table (n. 3), *Quai d'Orsay* continued its subsidies to the missionary activities along with the generous funding of the newly established *Mission laïque's* secular schools in Thessaloniki. The long-standing presence and influence of the French religious schools couldn't be ignored and the maintenance of the flow of funding demonstrates France's intention to use education abroad, secular or religious, as a principal means of cultural penetration. The issue was not limited merely to the promotion of the French language, but to cultural dominance, the creation, in other words, of long-term ties revolving around the interests of French policy. Supporting all activities promoting Francophonie was the context of the French soft power imperialism amidst the Great Powers fierce competition (Smith 2023: 72–104; Burrows: 109–135).

Table n. 3 – French State Subsidies¹³

Institution	1907–08	1910–11	1911–12
Brothers School (Frères)	4000	4000	3600
Parish school (Frères)	1000	1000	1000
Sisters of Charity School – hospital	2000	2000	2000
Sisters of Charity hospital	400	400	600
Zeitenlik Boarding School	400	400	400
Sisters of Charity School Kalamarie	200	200	400
Religious expenses (Frais de culte)		200	200
Lazarist School, Kavala	600	600	300
Sisters of Charity Kavala			300
Total	8,600	8,800	8,800

As we can identify in the following table, funding for the missionary activities continued. In the years after the First World War, France sought to further capitalize on its strong presence in Thessaloniki and Macedonia during

¹³ For the school year 1907–08: MAE-CADN—Nantes, B/604PO/B/83, Ambassade de France au consul de France à Thessalonique, Constantinople, 4 décembre 1907. For the school year 1910–11: *ibid.*, Ambassade de France au consul de France à Thessalonique, Constantinople, 27 octobre 1910. For the school year 1911–12: *ibid.*, Ambassade de France au consul de France à Thessalonique, Financement des institutions, Thérápia, 19 octobre 1911.

the war. As member of the *Entente* forces, France had a dominating presence in Thessaloniki since the establishment of the Macedonian Front on the northern territories of Greece (Mazower 2005, 311–317). Hence, as elsewhere in the Mediterranean, *Quai d'Orsay* continued funding both secular and religious initiatives (Spagnolo 1974: 580).

Table n. 4 – French State Subsidies¹⁴

Institution	1919	1921	1923
Brothers School (Frères)	3600	4000	4000
Extraordinary grant for the Brothers school			10000
Parish school (Frères)	1000	1200	1000
Sisters of Charity School	2000	2500	3500
Sisters of Charity hospital	600	1000	1000
Zeitenlik Boarding School – Orphanage	1000	1000	1000
Sisters of Charity School – Orphanage Kalamarie	400	1000	2000
Religious expenses (Frais de culte)	200	200	300
Lazarist School, Kavala	300	500	500
Sisters of Charity Kavala	300	1000	1000
Sisters of Charity Orphanage Kilkis		500	500
Sisters of Charity Orphanage Giannitsa		500	500
Total	9,400	13,400	25,300

Table n. 4 shows how the French state expanded its funding for the missionary activities, not only in Thessaloniki but elsewhere. At a time where the consequences of war, whether in urban centers like Thessaloniki or in small towns like Kilkis and Giannitsa were devastating, the missionaries increased their activities to support the needy ones. That is why there is evident care for orphan children. Moreover, after the devastating fire of 1917 that destructed the biggest part of the old center of the Thessaloniki, thousands of people were left

¹⁴ For the school year 1919: MAE-CADN—Nantes, Serie B/604PO/B/84, De l'ambassade de France (Athènes) au consul de France à Thessalonique, Athènes, 7 novembre 1919. For the school year 1921: *ibid.*, De l'ambassade de France (Athènes) au consul de France à Thessalonique, Athènes, 19 août 1921. For the school year 1923: *ibid.*, De l'ambassade de France (Athènes) au consul de France à Thessalonique, Subventions aux institutions, Paris, 23 août 1923.

homeless and the same applied for infrastructure and educational establishments, especially of the Jewish community. Witnessing a great enrollment of pupils, the French consulate increased its subsidies and provisioned an extraordinary sum for the *Frères*' school, since it suffered serious damages from the fire.

Overall, Francophonie was promoted through the activities of Catholic missionaries; accordingly, the French state subsidized their educational and philanthropic initiatives over several decades.

Missionary education and ethnic mingling

As mentioned above, the French missionaries in the Ottoman Empire became a useful tool for the promotion of "French civilization" and, more broadly, of colonial ambitions. From their part, the *Lazarists* became the primary spearhead of catholic proselytizing efforts in Macedonia. The arrival of the *Sisters of Charity* (*Sœurs de la Charité de Saint Vincent de Paul*) in 1855 and of the *De La Salle Brothers* (*Frères*) in 1888 laid the foundations for the French educational presence in Thessaloniki. The former, alongside the establishment of a rudimentary hospital, founded a girls' school, while the latter established the boys' school of the *Brothers*, also known as the *De La Salle School* (*École de Saint Vincent de Paul*). We need to point out here, that contrary to the mingling of the catholic monks and nuns with the society in Thessaloniki, the Orthodox monks, withdrawn from the secular world in their monasteries, especially in Mount Athos (Agion Oros), avoided unnecessary interactions with the lay people even in their large estates (metochia) in Halkidiki (Bouroutis 2021).

Information concerning the arrival of the *Sisters of Charity* in Thessaloniki is fragmentary. As mentioned, their presence can most likely be dated to the period of the Crimean War (1853–1856), as they were engaged in the care of soldiers in various regions, not solely on the battlefield. In the Cyclades islands in Greece, their presence is documented as early as 1841 on Santorini, and subsequently on other islands such as Syros and Tinos, which had significant Catholic populations. Their activities included the establishment of schools, boarding schools, orphanages, soup kitchens, and facilities for medical care. According to the archives of the *French ministry of Foreign Affairs*, the catholic nuns arrived in Thessaloniki in 1855 and immediately founded a school with two classes and 40 female pupils. The provision of medical care by the *Sisters* began in 1868, or at least from that year onward they kept detailed records of their activities.¹⁵ Additionally, there was a girls' school of the French *Sisters of Charity* (*Soeurs de Charité*) in Smyrna established in 1840 (Solomonidis 1961: 224–225).

In Thessaloniki, they settled in the district known as the Frankish Quarter (today Frangon street), specifically within the city block where the catholic church was established. As illustrated in the sketch included in the relevant French archi-

¹⁵ MAE-CADN – Nantes, Series B/604PO/B/83, Dossier de l'année 1908, Hôpital français au consul de France à Thessalonique, 23 août 1908. The report has a brief history of the presence of the nuns in Thessaloniki.

val files, the complex constituted a complete institutional infrastructure, occupying an urban block now bounded by Frangon street, Typou, Syngrou, and Catholicon streets (according to the Italian-language plan, Syngrou Street coincided with Via de Consolato Francese—French Consulate Street).¹⁶

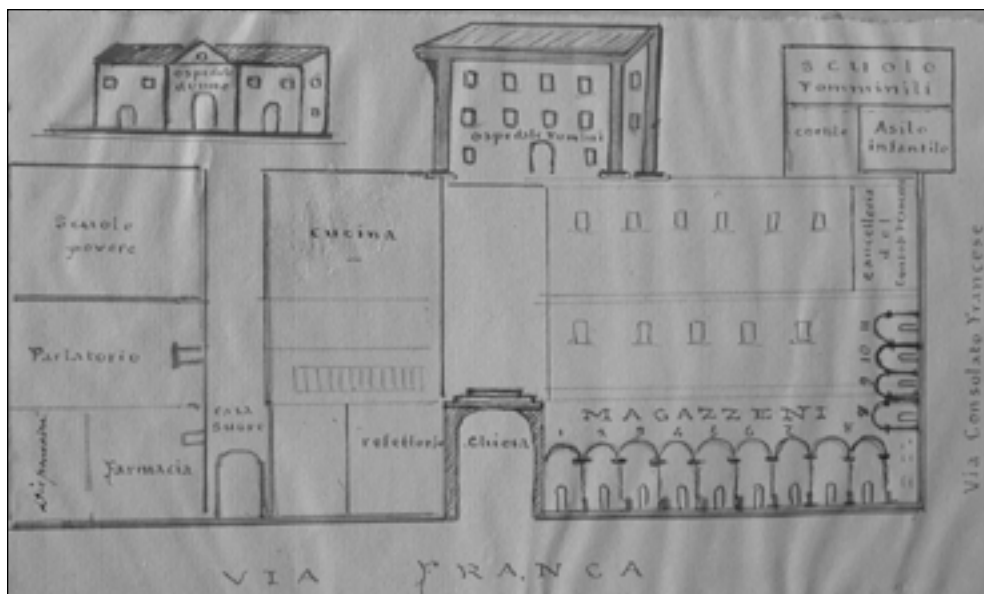


Photo n. 1. French hospital and monastery compound

According to the plan, in addition to the catholic church of the Immaculate Conception, located slightly behind the Frangon Street façade, where the complex included a pharmacy, and at the rear of the plot a kitchen and refectory, as well as the building of a small parish school, essentially for impoverished children, operating under the guidance of the *Brothers (Frères)*. Along French Consulate Street, at the level of today's Syngrou Street, stood the French consular offices, next to which were located the girls' school and the kindergarten, with a small courtyard for recreation. At the rear, along Catholicon Street, two buildings were developed: one dedicated to the hospitalization of women and the other serving as the men's hospital. In the same premises there was also a boarding school for resident female students attending the school. As can be ascertained, this also included abandoned children who were cared for by the nuns.

A defining feature concerning the missionary schools was their ability, from the outset, to attract pupils from all Christian denominations as well as Jewish students, despite reports to the contrary (Nehama 2000: 1480). This fact reflects the strong demand for education in Thessaloniki beyond the confines of communal frameworks. Although suspicion persisted due to the missionaries'

¹⁶ Ibid.

commitment to Catholicism, the schools became a pole of attraction for students from all communities, particularly after its initial years of operation.

Drawing on the long-standing tradition in educational practice, French religious schools confirmed their reputation in Thessaloniki by attracting, within a relatively short period of time, children from all the city's communities. With the financial support of the French consulate, both the *Brothers* boys' school and the *Sisters of Charity* girls' school succeeded in enrolling students regardless of the catholic religious atmosphere that characterized these institutions and despite reservations concerning potential proselytism. This success was largely due to the advanced curriculum of the missionaries' schools. The curriculum of the *Brothers'* school combined traditional humanities (Religious Studies, Calligraphy, Reading) with scientific subjects (Physics, Chemistry, Algebra), as well as vocationally oriented courses such as Commercial Correspondence, Accounting, and Commercial Law, alongside several foreign languages.¹⁷ The teaching of Judeo-Spanish (Ladino), Greek, and Turkish corresponded to the city's three major communities, while German and Italian instruction reflected both professional needs and competition with other European schools operating at the time.

For the *Sisters of Charity* and their girls' school (*École française des Sœurs de la Charité*), the more classical curriculum included French Grammar, Orthography, Calligraphy, History, Geography, Literature, Natural History, Cosmography, Physics, Geometry, Arithmetic, Ancient Greek History, French History, Medieval History, Religious Instruction. Also, the nuns operated a kindergarten (*salle d'asile*) with 80 children, alongside an orphanage housing 40 children. The nuns supported impoverished families and orphaned children through the financial assistance by the French consulate and tuition fees paid by some of the pupils.

Table n. 5 – Sisters of Charity, School year 1891–92¹⁸

Curriculum		Nationality*	Religion
French grammar	French History	French 16	Catholics 172
Orthography	Medieval History	Polish 2	Protestants -
Calligraphy	Religion	Austrian 8	Orthodox 18
History		German 5	Jews 25
Geography		Bulgarian 1	Muslim -

¹⁷ Ibid. École des Frères au consul de France, De Lacretelle, Thessalonique, 23 février 1892, programme de l'année scolaire.

¹⁸ Ibid. À l'ambassade de France (no sender indicated; handwritten document in poor condition), Liste récapitulative des écoles religieuses de Thessalonique, Monastir et Kavala, Thessalonique, 12 novembre 1891.

Literature		British 4	
Natural History		Italian 84	
Cosmography		Greek 22	
Physics		Ottoman 70	
Geometry		Albanian 1	
Arithmetic		Vlach 2	
Ancient Greek History		Total 215	Total 215

* The relevant column does not indicate nationality or citizenship, which suggests that national affiliation is based on the declarations of the female students or the nuns. This is evident given that no official Albanian state existed prior to 1913. With regard to the designation ‘Vlachs,’ there are references in several documents, as the monks recognized them as a distinct community, and in 1901 they were officially recognized as a ‘millet’ by the Ottoman authorities. As mentioned above, we are aware of the intense activity of the *Lazarists* in regions with Vlach populations.

The same, more or less picture we have in the coming years where both schools had a good enrollment from all communities and religious faiths. The low number of Muslim girls in the *Sisters* school was evidence of the conservative spirit of the Muslim community of Thessaloniki, even of the Dönme, the converted Jews to Islam, who preferred their own communal schools. (Baer 2010: 44–64)



Photo n. 2. Ecole Frères

Table n. 6 – Students according to religious beliefs¹⁹

Religion	Brothers school (Frères)		Sisters of Charity school (Sœurs de la Charité)	
School Year	1904–1905	1905–1906	1904–1905	1905–1906
Catholics	60	78	182	205
Orthodox	40	48	34	36
Jews	43	51	27	30
Muslims	12	15	2	1
Protestants	-	-	-	3
Total	155	192	245	275

The steady financial support of the French state enabled the monastic orders to expand their activities to other parts of Macedonia, with the aim of strengthening Catholicism. In a report by the French embassy in Constantinople in 1903, it was mentioned that in the Thessaloniki vilayet the missionaries operated 10 schools, one hospital (Thessaloniki), four orphanages and nine monasteries. It should be noted again, that beyond Thessaloniki, the nuns' activities were concentrated in areas inhabited by Slavophone populations who, due to poverty and adverse living conditions, were particularly susceptible to change.²⁰

A report by the *Sisters of Charity* in 1910 is indicative of the expansion of their philanthropic work in parallel with the reinforcement of the catholic doctrine.²¹ Thus, a total of 19 nuns and eight nun-nurses, along with an additional 10 staff members, were employed at the nuns' school and the hospital in Thessaloniki. At the Kalamaria school, which also functioned as an orphanage, there were 12 nuns and three additional employees. The expansion of the nuns' activities continued up to 1911 and extended to several other locations. Specifically, in addition to the boys' school in Monastir, a girls' school was established, as mentioned in the subsidies' tables above, employing a total of 10 nuns and two additional staff members. An elemen-

¹⁹ MAE-CADN – Nantes, *ibid.* For school year 1904–05 at the De La Salle Frères school: *ab-leau statistique de l'école des Frères de La Salle, Thessalonique, 1er mars 1905.* For school year 1905–06, at the De La Salle Frères school, *Tableau statistique de l'école des Frères de La Salle, Thessalonique, 1er mars 1906.* For school year 1904–05 and 1905–06 at the Sœurs de la Charité school: *Tableau statistique des Sœurs de la Charité, Thessalonique (without date).*

²⁰ MAE-CADN—Nantes, *Ambassade de France a Constantinople/ Enseignement laïque français en Turquie/Serie E/166PO/E/910, Liste des couvents, eglises, chapels, etablissements de bienfaisance relevant de l' ambassade de France, année 1903.*

²¹ MAE-CADN—Nantes, *Fonds Salonique Consulat/Series B/604PO/B/83, Rapport des Sœurs de la Charité, Thessalonique, 27 mars 1910.*

tary hospital also operated on the same premises. In Kilkis (Kukus), the nuns maintained an orphanage with 52 children, a school with 62 pupils offering free attendance, and an elementary hospital. In Palliortsi, a settlement almost unknown in the Greek historiography, located in the kaza of Gevgelija constituting part of a large estate belonging to the *Lazarist* monks, the *Sisters of Charity* established an orphanage housing 56 children. The monastery-orphanage reportedly accommodated 26 nuns. The reason is evident: surviving sources indicate that this village was inhabited by 145 Slavophone catholic Uniates, while dense schismatic populations also lived in the surrounding settlements, which were linked to the agricultural cultivation of the catholic estate (Halkiopoulos 1910: 36).²²

Furthermore, in Giannitsa (Yenidge Vardar), a school with 180 pupils and an elementary hospital were established, staffed by six nuns. Finally, in Kavala, the nuns, following the *Lazarists*, also founded an elementary school with 92 pupils.²³

The first serious difficulties faced by the religious schools of the catholic orders in Thessaloniki and Macedonia emerged in 1911, with the outbreak of the Italo-Turkish War. This development was largely due to the fact that a number of monks and nuns were of Italian origin and held Italian passports. Attempts by the Ottoman authorities to expel them were met with resistance from the *Lazarist* monks, who in many cases appealed to the French consulate for protection. They invoked the principle of French protection over catholic orders in the Orient, based on capitulatory privileges dating back to the 18th century.²⁴

²² During the Second Balkan War, the village became a theater of collateral clashes, resulting in civilian casualties. Carnegie Endowment, Report of the international commission to inquire into the causes and conduct of the Balkan Wars, Washington 1914, p. 103.

²³ MAE-CADN—Nantes, Fonds Salonique Consulat/Serie B/604PO/B/83, Rapport des Sœurs de la Charité, Thessalonique, 27 mars 1910.

²⁴ MAE-CADN—Nantes, Fond Salonique Consulat/Serie B/604PO/B/83, Lettre des Frères Lazaristes au consul de France, Zeitinlik, 12 décembre 1911. As it is evident, the matter concerned the catholic nuns of the Order of the Eucharist who were residing in the village of Paliórtsi, in Gevgelija. In the ensuing diplomatic tug-of-war, the French embassy ultimately replied that the Italian monks and nuns did not fall under its protection and that they should instead appeal to the Italian diplomatic authorities. MAE-CADN—Nantes, *ibid.*, Ambassade de France au consul de France à Thessalonique, Péra, 22 décembre 1911.

Table n. 7 – Sisters of Charity. Nationality—Religion 1912–1913²⁵

Nationality	Muslim	Jewish	Greek Orthodox	Bulgarian Orthodox	Serbian Orthodox	Catholic	Protestant	Armenian	Religion
French		3				24			27
Ottoman	14	190		19		112			335
Italian						50			50
Greek			26			10			36
Bulgarian									
Austrian		3				24			27
Serbian					1				1
Romanian			1						1
German						5	1		6
Total	14	196	27	19	1	225	1		483

The nuns' school continued to record a high number of female pupils, a fact that can be attributed in part to the exemption from tuition fees offered to a large segment of the student population.²⁶ The voluntary nature of the nuns' labor, carried out within the framework of their religious duties, alongside their philanthropic work at the French hospital, had enhanced their reputation and alleviated apprehensions regarding their religious identity. It is indicative that 196 Jewish pupils and 27 Orthodox pupils were enrolled, along with an additional 19 Bulgarian girls. Notably, at least 10 Greek female pupils who adhered to the catholic doctrine also attended the school; it is plausible that their number was considerably higher, but that many held Ottoman citizenship. We should point out that on 26 October 1912 the Greek army had annexed Thessaloniki, an outcome of the First Balkan War.

²⁵ MAE-CADN—Nantes, Fond Salonique Consulat/Serie B/ 604PO/B/84, Tableau statistique des Sœurs de la Charité, Thessalonique, 7 avril 1913.

²⁶ Ibid. For year 1912–13, 149 pupils were granted full exemption from tuition fees, 102 received a one-third reduction, and 53 were exempted by one half.



Photo n. 3. Ecole Kalamarie

However, the most noteworthy educational activity was that of the nuns' school in the Kalamaria area. Confirming the view that European schools, even religious ones, drew their student body primarily from the urban bourgeoisie of Thessaloniki, the French consul underlined in his annual report that the Kalamaria school, owing to its seaside location and its attractive surroundings, attracted pupils from wealthy families in the area.²⁷ As the consul emphasized, this was particularly significant for the expansion of French influence in the most important social class of Thessaloniki, while also underscoring the need for further efforts to increase the number of pupils in this direction. Statistical data likewise reveal here the intermingling of the city's communities, with a substantial number of Jewish pupils (76) as well as Greek pupils (53), given that the specific district had a high proportion of Greek residents (Kolonas 2016: 99–100).

As expected, tensions intensified during the two Balkan Wars and the widespread military engagement throughout Macedonia. In several instances (Zeitenlik, Kilkis, Gevgelija), members of the religious orders requested the intervention of French diplomatic authorities. In many cases, these incidents

²⁷ MAE-CADN – Nantes, Fond Salonique Consulat/Serie B/604PO/B/83, Le consul de France à l'ambassade de France à Constantinople, Thessalonique, 16 février 1911, Subventions aux établissements français.

concerned villages in the vicinity of Gevgelija, an area that had come under Serbian military occupation.²⁸

Regarding the *Lazarist* orphanage in Zeitenlik, historiography suggests that all residents were Bulgarians who had converted to Catholicism through the Uniate framework (Kondogiannis 1910). However, statistical reports submitted by the monks to secure French funding included children of other nationalities. In the 1913–1914 school year, 46 residents were recorded: 28 Bulgarians (21 Catholics and seven Orthodox Exarchists), two Albanian Catholics, four Greek Orthodox children, and eight Italian Catholics. Particularly noteworthy is the inclusion of one Orthodox Vlach (Valaque).²⁹

The following year, during wartime, the number of residents reached 35, and the classifications provided by the *Lazarists* become even more revealing. 27 residents were listed as Catholics, one as Ottoman, and seven as Orthodox. All eight Slavic-speaking residents were Catholic and identified by the monks as Macedonians. In addition, there was one Romanian Catholic and one Orthodox Vlach, suggesting that the monks distinguished between Romanians and Vlachs.³⁰

As the statistical data indicate, French religious schools continued their uninterrupted operation and philanthropic activities, despite the fact that certain initiatives, such as the orphanage in Kilkis, created tensions in relations between the Catholic monastic orders and the Greek authorities. It is evident that the monks regarded their institutions in the former Ottoman territories as autonomous enclaves, falling outside the jurisdiction or control of any secular authority. In effect, they did not recognize local state authority in the areas where they operated, with the exception of the French diplomatic authorities, which provided them with substantial financial support. This stance was rooted in their long-standing presence and the privileges they had enjoyed under the capitulatory system as protégés of France. However, circumstances were changing, and in the newly incorporated Greek territories, the principles of the orthodox doctrine, inseparably linked to the very foundation of the Greek state amid the rising Greek nationalism, were inevitably to be enforced sooner or later.

Despite the concerns and tensions in some cases, the missionary schools' operation remained untouched after the incorporation of Thessaloniki to the Greek state and the turmoil of the First World War.

²⁸ MAE-CADN—Nantes, Fond Salonique Consulat/Serie B/604PO/B/84, Lettre des moines lazaristes au consul de France, Zeitenlik, 18 février 1913.

²⁹ MAE-CADN—Nantes, *ibid.*, Lettre des moines lazaristes au consul de France, Zeitenlik, 4 mars 1913..

³⁰ *Ibid.* Lettre des moines lazaristes au consul de France, Zeitenlik, 6 décembre 1914.

Table n. 8 – Sisters of Charity. Nationality—Religion³¹

Nationality	Religion	1919–20	1920–21	1921–22
Greek	Jewish	320	301	296
	Orthodox	105	90	73
	Muslim	22	21	23
	Catholic	110	101	110
French		17	15	14
Italian			47	
Serbian			40	
Armenian			10	
Other nationalities		101	8	82
Total		675	633	598

From the rising figures it is evident, that the *Sisters'* schools retained their popularity in the Greek period and after the perplexities of the First World War. A contributing factor to this was that the French missionary schools up to a certain point inherited a Greek curriculum and this development contributed in the augmentation of Greek students.

The strong presence of pupils from the Jewish community at the nuns' school operating in the center of Thessaloniki becomes readily apparent through an analysis of the data concerning pupils who held Greek citizenship. Equally noteworthy is the participation of Greek girls adhering to both the orthodox and the catholic doctrines, the latter in particular confirming the existence of a notable Greek catholic community in Thessaloniki, that was almost completely unknown in the local historiography with the exception of *Analecta Historica*, the publications of the Apostolic Vicariate of Thessaloniki.

The French hospital

The first official reference to the French hospital and its funding by the French state as mentioned above, appears in documents of the *Quai d'Orsay* dated 18 August 1891.³² Specifically, the competent department approved a

³¹ Ibid., Statistical table for school year 1919–20, 1920–21, 1921–22 of the Sisters of Mercy, Le consul de France à Thessalonique à l'ambassade de France à Athènes, Thessalonique, 27 juin 1922. In years 1919–20 and 1921–22, the pupils of French, Italian and other nationalities were categorized in general as “other nationalities”.

³² MAE-CADN—Nantes, Fond Salonique Consulat/Serie B/604PO/B/83, Ministère des Affaires étrangères, sous-dossier pour l'année 1891, Direction des affaires politiques au consul de France à Thessalonique, Aide financière, Paris, 18 août 1891.

grant of 800 FFr for the school and hospital of the *Sisters of Charity* (*Sœurs de la Charité*). However, a clarifying handwritten note accompanying the funding report reveals that the *Quai d'Orsay* had begun financing monastic orders in Thessaloniki as early as 1888, allocating 500 FFr to the *Lazarists* in Zeitenlik (Stavroupoli) and 500 FFr to the *Sisters of Charity* in the city center.

From 1892 to 1895, state funding, as mentioned in the tables above for the school and hospital increased. It is noteworthy that while detailed information is provided regarding the school, its student body, and the religious affiliation



Photo n. 4. French hospital

of its pupils, few details are initially offered about the hospital, a gap that would later be filled. This likely reflects the ministry's emphasis on education in its presentation of religious orders' activities, as education was considered a key instrument for strengthening the French influence.

During the same period, Ottoman authorities sought to regulate the professional framework of medical and pharmaceutical services by issuing a firman that made possession of a diploma mandatory for professions such as pharmacists and physicians. In the autobiographical account of the physician Meir Yoel, edited by Rena Molho, Yoel describes the period toward the end of the century, noting how empirical pharmacists from Thessaloniki traveled to Constantinople to purchase diplomas, following an "oriental" practice, rather than obtaining them through examinations (Yoel 2012: 62–63).

Despite the tightening of regulations, the activities of the *Sisters of Charity* in medical services continued uninterrupted. Although no information is provided as to whether the nuns exclusively engaged in hospital work were formally accredited, it is known that a licensed physician headed the French institution. The Greek surgeon Panagiotis Oikonomou served for a period as the hospital's chief surgeon. Oikonomou was among the most prominent scientists of the Greek community and maintained close ties with the French presence in the city, as evidenced by his participation in the governing board of the secular schools of the *Mission laïque (Lycée)* during their establishment. He also served as a physician at the Greek hospital (*Theageneio*) and as director of the surgical clinic of the Ottoman municipal hospital of Thessaloniki (Bouroutis 2018: 109).

The first comprehensive data on the hospital's activities appear at the beginning of the 20th century, in the form of a statistical table recording patients hospitalized at the French hospital from 1868 to 1899, that is, through the end of the 19th century.

Table 9. Annual patient hospitalization data (1868–1899)³³

Year	Total number of patients	Total number hospitalization days	Total number paying patients	Total number paying hospitalization days	Number of free patients	Free hospitalization days
1868	12	217	11	165	1	52
1869	18	425	14	346	4	79
1870	28	328	21	239	7	89
1871	63	714	57	622	6	92

³³ MAE-CADN—Nantes, *ibid.*, Sous-dossier pour l'année 1900: Registres statistiques des hospitalisations à l'Hôpital français des Sœurs de la Charité. (noted in the report as Sisters of Saint Vincent de Paul) pour les années 1868 à 1900.

1872	41	385	38	350	3	35
1873	15	148	11	115	4	33
1874	40	571	39	542	1	29
1875	38	434	33	308	5	126
1876	41	541	26	287	15	254
1877	64	1022	45	823	19	199
1878	98	1261	90	1195	7	66
1879	80	1668	74	1608	6	60
1880	121	2564	114	2398	7	166
1881	79	1204	74	1134	5	70
1882	44	554	36	320	8	234
1883	24	333	19	263	5	70
1884	14	318	11	242	3	76
1885	89	1161	71	974	18	187
1886	80	1371	61	1106	19	265
1887	65	1506	36	1005	29	501
1888	42	769	19	453	23	316
1889	50	1018	25	236	25	782
1890	69	1247	52	568	17	679
1891	259	3259	194	2694	65	565
1892	393	4962	340	4079	53	883
1893	568	7038	443	5538	125	1500
1894	701	8957	605	8168	96	789
1895	196	2896	125	1913	71	983
1896	144	2381	80	1852	64	529
1897	219	1610	161	1062	58	548
1898	153	2543	114	2085	39	458
1899	200	2627	145	2104	55	523
Total of 32 years	4047	56032	3184	44794	863	11238

The table provides valuable insights into both the significant contribution of the *Sisters of Charity* to healthcare provision and the manner in which this activity was structured. A key observation is that the nuns offered free medical care to those unable to afford hospitalization fees. This was not achieved through a numerical balance between paying and non-paying patients. In 1888, for example, 19 patients paid for their hospitalization, while 23 did not; in the following year, 25 patients paid and 25 received care free of charge. However, the former were hospitalized for a total of 236 days, while the latter accounted for 782 days. On average, paying patients were hospitalized for 9,4 days, whereas non-paying patients remained for over a month

(31,3 days). The financial burden on the hospital must therefore have been substantial.

Equally noteworthy are the peaks observed in certain years, which suggest a connection with local or broader political events. From 1877 to 1881, hospitalization rates increased significantly, possibly linked to the Russo-Turkish War of 1877–1878 and the subsequent instability in the Macedonia geographical region. An even more pronounced increase occurred between 1891 and 1894, when patient numbers rose dramatically (259 in 1891, 393 in 1892, 568 in 1893, and 701 in 1894). The nuns themselves provide an explanation, noting in the statistical table that this period coincided with the construction of the Thessaloniki–Dedeagatch (Alexandroupoli)—Constantinople railway line, operated by the French-controlled *Junction Railway Company* (*Junction Chemin de Fer*—JSC). It was therefore logical for a company of French interests to turn to the French hospital for the care of its workforce during construction.

Additional information regarding the hospital's activities is available for 1904.³⁴ In their report to the French consul, the *Sisters of Charity* noted that 256 patients were hospitalized that year, of whom 211 paid fees and 45 were treated free of charge. Notably, 5,400 patients of all nationalities and religions were examined free of charge without requiring hospitalization, functionally equivalent to modern outpatient services. Furthermore, the nuns received 22 abandoned young children, confirming that the boarding facilities also served abandoned minors. Finally, the report states that the Sisters conducted 1,080 free home visits to Catholics and 5,600 to citizens of other faiths, including Jews and Muslims.

These data demonstrate the significant contribution of the *Sisters of Charity* to medical and pharmaceutical care in Thessaloniki. Their work combined fee-based medical services with philanthropy for those unable to pay. It is therefore pertinent to examine the financial contribution of the French state to the *Sisters'* activities and to the operation of the hospital. As mentioned in the relevant chapter concerning the activities of the French consulate, state subsidies for the Sisters' operation of the school and hospital in the center of Thessaloniki stabilized at 2,000 FFr annually in the early 20th century. From 1910 onward, an additional subsidy exclusively for the hospital appears, initially 400 FFr and rising to 600 FFr in 1911. This development was unsurprising, given the intensifying competition among European powers for influence. Following the establishment of the Italian hospital in 1907, Russian and Jewish hospitals were also founded. Nevertheless, questions arise regarding the hospital's operating costs and whether state subsidies adequately covered expenses.

³⁴ Ibid. Sous-dossier pour l'année 1905, Rapport d'activité de l'école et de l'hôpital des Sœurs de la Charité (Sœurs de Saint-Vincent de Paul).

The first financial data concerning hospital operations date to 1910.³⁵ The hospital then had 42 beds and performed 184 paid surgical procedures and 50 free of charge. A total of 123 paying patients and 38 non-paying patients were hospitalized. In all, 395 patients were treated or operated on, with 88 receiving free care.

The 1910 financial statement reveals total revenues of 15,120 FFr, including a 400 FFr state subsidy and 12,000 FFr in hospitalization fees, resulting in a deficit of 3,120 FFr. Outpatient services, which were provided treatment free of charge, averaged 200 visits per day. Their cost amounted to 450 FFr in physicians' fees and 1,000 FFr in medical supplies. Home visits were provided to 2,400 individuals at a cost of 520 FFr. Additional expenses included 1,520 FFr for the care of 15 abandoned infants and 480 FFr for five children transferred to the *Lazarist* orphanage in Zeitenlik. Total non-hospital expenses reached 4,150 FFr, while extraordinary revenues totaled 3,230 FFr, leaving a further deficit of 920 FFr. Overall, the hospital operated at a deficit of 3,640 FFr. Despite this, its contribution to the city was substantial, particularly for those unable to pay. Since the hospital was considered a French establishment, the philanthropic mission of the nuns reinforced French influence.

Archival documents indicate that in 1910 the hospital was headed by doctor Albert (Alfred) Siaki.³⁶ His leadership appears to have enhanced the institution's visibility within French diplomatic circles, as detailed statistical reports for 1910 and 1911 appear for the first time. Siaki's records classify hospitalizations by illness, recoveries, and deaths. According to the reports, of 140 hospitalizations, 133 patients recovered and seven died. Among 177 surgical cases, mortality rate was 7%, with 12 deaths. Given the medical conditions and technological limitations of the era, these outcomes suggest a notable level of effectiveness.

With regard to surgical procedures, Siaki classified the 177 cases in total as follows: head and neck operations, numbering 28; upper and lower limb surgeries, with 35 surgeries; primarily trunk-related procedures, comprising 11 surgeries; and abdominal operations, totaling 51. A further 52 operations concerned the female and male genital organs. Given the wide range of surgical procedures and the varying severity of each case, a total of 2,140 hospitalization days were required, while the mortality rate reached 7%. In other words, 12 patients succumbed. Although this number is not insignificant, one must take into account the conditions of the period and the medical resources available to physicians at the time. The French Hospital undertook a variety of cases with considerable success.

The French hospital and the activities of the *Sisters of Charity* continued after the incorporation of Thessaloniki to the Greek state. The establishment

³⁵ Ibid. Hôpital français de Thessalonique, rapport annuel pour l'année 1910. A stamp indicates that the document was received by Quai d'Orsay on 4 August 1911.

³⁶ MAE-CADN—Nantes, Fond Salonique Consulat/Serie B/604PO/B/84, Hôpital français de Thessalonique au consul de France, Thessalonique, 6 mars 1913. Registre des patients hospitalisés pour les années 1910 et 1911, tableau récapitulatif.

of the Macedonian Front and the arrival of the *Army of the Orient* during the First World War, composed largely of French and British colonial troops, further intensified French dominance and pro-French initiatives. Diplomacy combined with philanthropy proved highly effective in expanding French influence. Students from the *Mission laïque* schools organized performances in hospitals, including patriotic songs and the Marseillaise, for wounded soldiers, an effort described by the *Lycée* director as “excellent propaganda in every respect.”³⁷

Following the end of the war, the hospital continued to operate amid increased needs due to the arrival of Greek refugees from Asia Minor and Pontus after the Asia Minor Catastrophe. During the interwar years, despite the looming economic crisis, French diplomatic support persisted. In 1926, the French consulate funded several pro-French initiatives, including 1,000 FFr for the French hospital. Correspondence from late 1927 reveals that the hospital’s capacity had reached 50 beds.³⁸ In 1926, 547 patients were hospitalized for a total of 5,647 days, with 80 receiving free care. 300 surgical operations were performed. In 1927 (January–October), 356 patients were hospitalized, accounting for 4,015 hospitalization days.

According to the Mother Superior of the *Sisters of Charity*, the hospital provided 4,000–4,500 free outpatient visits annually. Financial records indicate significant expenses, offset primarily by patient fees and supplementary income from public baths managed by the Sisters, operating adjacent to the hospital, an important revenue source in a city where hygiene infrastructure remained inadequate during the interwar period.

Nonetheless, the French hospital operation had a substantial impact in the health care provided at a time frame of instability, war perplexities and lack of state initiatives for social welfare. Therefore, the imprint of the *Sisters of Charity* philanthropic work was important. This had also a positive effect in the French state initiatives for the French influence promotion.

Conclusions

Summarizing, the long-standing operation of the French missionary schools along with the hospital in Thessaloniki can be traced from the Ottoman period through the Greek era. France made significant investments in the activities of the catholic monastic orders in the Eastern Mediterranean and the territories of the Ottoman Empire. For French diplomacy the missionary activities constituted an excellent instrument of influence and the promotion of Franco-phonie during a period of intense European rivalries. Despite the official separation of State and Church in France in 1905 and the establishment of secular

³⁷ Archives nationales de France—Paris (National Archives of France – Paris), Mission laïque de France, Lycée français de Salonique, 60AJ/85, Écoles du Lycée au Secrétaire général de la Mission laïque à Paris, Thessalonique, 23 juin 1916.

³⁸ MAE-CADN—Nantes, *ibid*, Hôpital français au consul de France à Thessalonique, Thessalonique, 10 novembre 1927.

schools in the Ottoman Empire and more specifically in Thessaloniki (*Mission laïque*), the missionaries' establishments continued uninterrupted enjoying the economic support of the French diplomacy, a policy that continued even after the dissolution of the Ottoman Empire well into the interwar period.

In Thessaloniki, the monastic orders successfully operated kindergartens— orphanages, including care for abandoned children, boarding school, boys' and girls' schools and by the *Sisters of Charity* a hospital that became a center of primary health care. Beyond these institutions, the missionaries were active in neighboring areas such as Zeitenlik (Stavroupoli), Kilkis, Giannitsa, Kavala and Monastir providing corresponding services. This represents a commendable initiative at a time when the provision of similar services, such as medical care, had not yet become a matter of state responsibility. Furthermore, the successful operation of the missionary schools encouraged the mingling of the children from different communities, at a time where nationalism prevailed and set rigid borders between people.

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Religious and Metaphysical Language in Albanian and English Literature: A Comparative Study on Thomas S. Eliot and Naim Frashëri Poetic Languages

Abstract: This article explores the use of religious terminology in the poetic language of T. S. Eliot and Naim Frashëri through a comparative analysis of their explicit and implicit religious expressions. The study examines how metaphors, symbolism, and poetic forms convey spiritual meaning through close readings of selected poems (Frashëri: *Falja/Prayer*, *Fjalët e Qiririt/The Words of the Candle* and *E Vërteta/Truth*; Eliot: *Four Quartets*). The comparison shows how the literary traditions of both authors balance traditional religious contexts with symbolic, deeply meditative, and modern aesthetic forms. The article argues that both poets turn language into a medium for religious and philosophical contemplation, drawing on Persian, Indian, and European mythological and modern cultures. By employing universal elements, poetic prayer, and symbolic imagery, they contribute to literary discourse, situating poetry at the intersection of language and spirituality. In order to differentiate between doctrinal articulation and indirect, apophatic communication, the study engages conceptually with theories of P. Ricoeur, N. Frye, and G. Lakoff and M. Johnson on symbolic language and conceptual metaphors, thereby moving from descriptive comparison to theoretical problematization. The findings indicate that Eliot creates a predominantly implicit, symbolic, and contemplative discourse influenced by modernist poetics and Christian theology, while Frashëri employs a more explicit, mystic, and doctrinal language influenced by Bektashi and Persian traditions. Overall, the comparison shows that both poets use distinct linguistic metaphors to express their religious thoughts and experiences.

Keywords: *Apophatic theology, Cataphatic theology, conceptual metaphor, Bektashi mysticism, symbolic mediation, T. S. Eliot, Naim Frashëri.*

Introduction

Literary production has always been influenced by religion and metaphysical contemplation, shaping thematic priorities, symbolic contexts, and the expressive forms of poetic language. To understand these categories, it is important to examine historical trends, as religion and literature are closely connected through

language. The earliest known written record, “Formula e Pagëzimit” (1462) (The Formula of Baptism), followed by Gjon Buzuku’s “Meshari”, demonstrate that the Albanian language was first recorded by religious priests. These early writings, grounded in religious themes that gradually reached a biblical register, contributed to the development of Albanian poetic and literary expression. In this context, philo-biblical literature, represented by canonical authors such as Matrënga, Budi, Bogdani, Variboba, Keta, and Zarishi, was produced within what has been described as the Albanian biblical code (Hamiti 2024: 7). According to Hamiti, each author of that period exhibited a distinct approach to textual construction, literary forms, philosophical concepts, and creative temperament, despite sharing common writing goals (Hamiti 1999: 17). During this period, homeland, language, and religion formed an inseparable trinomial (Çabej 1971: 422).

It is noteworthy that Naim Frashëri’s first poem, “Dreams” (Ëndërrimet), was written in Persian, and his early poetic expression reflected oriental mystic sentimentalism, which would be preserved until the end (Buda 2000: 146). In addition, Muhamet Tërnavë in his book *Popullsia e Kosovës gjatë shekujve XIV–XVI* (Population of Kosova during XIV–XVI Centuries) provides significant historical insight regarding the Albanian language in the territories of present-day Kosovo during the 14th, 15th, and 16th centuries. He argues that the role of Latin among Catholic Albanians paralleled that of Slavic and Greek church languages among Orthodox Albanians in the region. Due to the lack of extensive original sources, it is difficult to determine with certainty whether Albanians in these territories used Albanian only as a spoken language or also in written form (Tërnavë 1995: 216). However, Tërnavë, citing Eqrem Çabej, observes that spoken Albanian among aristocratic feudal communities appears to have been used in private written forms, including correspondence and informal legal acts. On this basis, he suggests that Albanian likely existed not only as a spoken language but also as a written medium in certain contexts. The author further references Dhimitër S. Shuteriqi (Studime Filologjike, No. 3, 1976) to note that in 1618 the scholar Pjetër Budi demonstrated that Pal Hasi had authored religious texts in Albanian. This tradition was continued by Budi in the northeastern regions, where figures such as Pjetër Mazreku and members of the Bogdani family, including Andrea, Pjetër, and Luke Bogdani, were active in the seventeenth century. In the eighteenth century, this tradition was followed by Gjon Kazazi. Tërnavë concludes that Catholic Albanians wrote in Albanian using Latin letters, while also hypothesizing that Orthodox Albanian communities in present-day Kosovo may have used Cyrillic script (Tërnavë 1995: 216–218). Although this study is not primarily concerned with the historical development of the language itself, the contributions of the aforementioned scholars remain crucial for understanding the relationship between religion and literature through language, particularly in analyzing how religious language has influenced poetic expression, symbolic systems, and metaphysical concepts in Albanian literature.

Similar developments can be observed in late medieval and early modern England, where clerical involvement and the translation of religious texts contributed to the gradual establishment of vernacular English as a literary language. In this regard, Baugh and Cable note that literature produced in England during the Middle English period reflects shifting linguistic and cultural dynamics, as the upper classes often read French-language texts during a time when French functioned as the dominant language of education and culture (Baugh and Cable 2002: 143). Therefore, religious and linguistic influences in both Albanian and English contexts demonstrate that religion served not only as a theological framework but also as a significant literary and linguistic force shaping poetic expression and cultural development.

Theoretical and Contextual Framework

The paper relies on both international and local theoretical frameworks, as these studies provide insight into the symbolic and ethical reflection on the role of religion and metaphysics in shaping the language of writers, demonstrated by two renowned poets: Naim Frashëri and T. S. Eliot.

Religious motifs consistently bear cultural significance. Even when faith is not the central topic of a work, it filters in through the author's perspective (Krasniqi 2010: 45–46). The manner in which writers interpret the world through elements such as water, earth, air, and fire functions as a kind of creative alchemy. These elements serve as the basis for a mythical imagination, where the approach can become either mystical and metaphysical or remain straightforward and literal. Moving from a literal interpretation to one rich in myth and metaphysics lies at the heart of a writer's creative path, functioning not only as a process of self-discovery but also as a search for Creation, the Creator, and the act of searching itself as a creative force in poetry (Ismajli 2019: 8–9). Language connects both religion and literature, not solely at the figurative level (Hamiti 2024: 83). Mysticism, as Kryeziu states, is the individual's means of grasping metaphysics (Kryeziu 1998: 55). In his book *Literary Belief*, Hamiti offers an analysis of the relationship between writers and God, emphasizing that prayer is the most common way for people to communicate with God. Building on this concept, Hamiti addresses issues of literary and religious belief in 21st-century world literature by examining examples from Borges, Northrop Frye, and Dostoyevsky's *The Brothers Karamazov*. His analysis also includes the work of contemporary Albanian author Zejnullah Rrahmani, specifically the novel *Five Prayers*, in which Hamiti examines how the author evokes a type of literary faith based on a sense of real-presence by fusing fact and fiction to create a distinctive textual texture (Hamiti 2016: 64–69). Oral and written religious narratives such as folktales, legends, hagiographies, and scriptural passages play a significant role in shaping the poetic discourse due to cultural connections. Regarding this, Rexhepi in his monograph *Naim Frashëri dhe letërsia perse* argues for the importance of the history of contact among different cultures,

highlighting the fact that due to the long history of connections and cultural exchanges between Persians and Europeans, as well as the fact that they have impacted one another in many ways, ancient cultures like Persian have played a vital role in Europe at different dimensions (Rexhepi 2020: 26). Kuiper also deliberated on the respective topic writing:

It was not until the 16th century in the Netherlands and England that Western academics started looking into the literatures that were once referred to as “Oriental.” Even later, in the late 18th century, German Pre-Romantics and British scholars in Fort William, Calcutta, made the first attempts to understand Arabic and Persian poetry aesthetically. Some Europeans became interested in the many translations of Arabic and Persian poetry, particularly into German, that were published in the first half of the 1800s. (Kuiper 2010: 50).

With the help of symbols, we may comprehend the meaning of this idea during the Middle Ages: a sign that metaphysically links the visible and the invisible. Narratives with moral, cognitive, and even humorous elements are another way to communicate the message (Kryeziu 1998: 14). To this, Northrop Frye, by contrast, emphasizes that poetry cannot serve as a replacement for religious conviction, highlighting the notion that art remains subordinate to religion. The arts do not provide a whole way of life or objects of worship. According to Frye, transcendent ideas are a legitimate alternative for religion, specifically transcendent ideas that are reinterpreted within everyday experience, such as the replacement of belief in the immortality of the soul with recollection by others. Poetry speaks in the legendary language of religion because it uses imagination, whereas religion deals with transcendence. In this sense, religion can be viewed less as doctrine and more as a free-form mythology influenced by the boundless potential of human creativity (Frye 2003: 203). Similarly, Ismajli (2019: 68–70) examines mythic symbolism and metaphysical structures, showing how literary texts engage with existential and cosmological questions. These studies provide insight into the continuity of symbolic and ethical reflection in modern times bearing in mind that religious and moral themes are frequently explored in modern literature, particularly poetry, not as a means of escape but rather as a means of bringing people and God together via language. The influence of faith on literary expression is demonstrated by authors like Auden, Claudel, and Péguy, as well as poets like T. S. Eliot, who was influenced by Anglo-Catholicism. Allegorical stories with historical, social, or religious themes displace traditional character-driven novels in fiction. As demonstrated by Graham Greene, existentialist and thriller literature emphasizes freedom and bravery, two themes in which religion can elucidate moral significance. In order to stand for truth and spiritual insight that inspires culture, the church should encourage authentic creative endeavor rather than prudish or commer-

cial interests (Frye 2003: 242–243). Building on this viewpoint, Frye’s analysis of metaphor and myth in his book *Myth and Metaphor* clarifies on how poetic language functions outside ornamentation. According to Frye, metaphor and symbol serve as structural principles that allow literature to arrange human experience, especially with regard to time, transcendence, and spiritual meaning. Frye places images within larger mythic patterns (mythoi) that recur throughout literary and religious traditions rather than treating them as ornamental. In this way, poetic language turns into a mode of knowledge that can convey ideas that are not reducible to literal or doctrinal discourse. This is particularly important when interpreting contemporary poetry, which reconfigures traditional religious symbols into intricate symbolic systems that act as a mediator between the concept of the divine and human experience rather than abandoning them (Frye 1990: 162–163).

Poets’ language is based on messages, imagery and metaphors that, when interpreted, are actually symbols. In his book, *The Symbolism of Evil*, Paul Ricoeur, a prominent figure in hermeneutics, contends that symbolic and poetic language is essentially cognitive rather than merely decorative or expressive. He argues that symbols “give” meaning by presenting something that transcends their literal meaning, and that this “giving” encourages contemplation and interpretation. To put it another way, symbols inspire contemplation; they create an environment for philosophical investigation rather than conveying predetermined messages. Additionally, Ricoeur analyses a crucial hermeneutical thesis, particularly in the conclusion section on “the symbol gives rise to thought” articulating that myths and symbols are culturally and historically situated, and that engaging with them frequently leads to philosophical thinking, particularly in response to the existential and intellectual demands of contemporary culture:

The sentence, which enchants me, says two things: the symbol gives; but what it gives is occasion for thoughts, something to think about. The symbol gives: a philosophy instructed by myths arises at a certain moment in reflection, and beyond philosophical reflection, it wishes to answer to a certain situation of a modern culture. (Ricoeur 1967: 348).

This can be used as a theoretical foundation to support the claim that symbolic mediation rather than direct reference is how poetic language functions. In this way, symbols serve as both epistemic tools and meaning-generating structures because they provide interpretive depth by implying various levels of meaning. Ricoeur’s assertion changes the emphasis from what a symbol “says” to what it “provokes.” This encourages an interpretive approach where the reader actively contributes to the meaning-making process rather than being a passive recipient. Similarly, since poetic symbols address existential issues and broader cultural conditions, myth, culture, and context enable us to place analysis within historical and cultural frameworks. Lastly, Ricoeur’s viewpoint

is consistent with a hermeneutic approach, which holds that meaning is not fixed but rather develops via interpretation.

While Ricoeur approaches symbols from a hermeneutic perspective, Lakoff and Johnson's (1980) Conceptual Metaphor Theory provides a methodical explanation of how metaphor structures human thought rather than just decorating language. Both the opposing "myth of subjectivism," which locates meaning solely within individual imagination, and the conventional "myth of objectivism," which holds that meaning is fixed, literal, and independent of human cognition, are extensively deliberated by Lakoff and Johnson:

What the myths of objectivism and subjectivism both miss is the way we understand the world through our interactions with it. What objectivism misses is the fact that understanding, and therefore truth, is necessarily relative to our cultural conceptual systems and that it cannot be framed in any absolute or neutral conceptual system. Objectivism also misses the fact that human conceptual systems are metaphorical in nature and involve an imaginative understanding of one kind of thing in terms of another. What subjectivism specifically misses is that our understanding, even our most imaginative understanding, is given in terms of a conceptual system that is grounded in our successful functioning in our physical and cultural environments. (Lakoff and Johnson 1980: 195).

To this end, they offer a viewpoint that organizes meaning through conceptual metaphors that map abstract domains onto more tangible experiential ones. Meaning is derived from embodied experience. From this perspective, metaphor turns into a basic cognitive process that uses bodily-informed and culturally grounded structures to help people comprehend abstract concepts like spirituality, existence, and transcendence. This enables analyzing recurrent symbolic patterns more methodically by interpreting poetic imagery as instances of underlying conceptual metaphors (Lakoff and Johnson 1980: 187–195). By showing how metaphor and symbolism work together as interpretive structures that produce layered meanings within poetic discourse, this method may support Ricoeur's assertion that symbols "give rise to thought".

In conclusion, this study distinguishes between explicit and implicit religious language as two analytical modes of theological expression in poetic discourse. While explicit religious language refers to direct lexical and doctrinal references to the divine, including obvious invocation, prayer-like structures, and affirmations of theological concepts, on the other hand, implicit religious language runs through symbolic mediation, deeper metaphorical structuring, and indirect suggestion, which often align with apophatic approaches that emphasize the ineffability of the divine. Within this framework, the study uses Frye's theory of mythoi and archetypes as a macro-structural lens to place both T. S. Eliot and Naim Frashëri within a larger, universal symbolic system

of religious poetry thereby contributing to a more operationalized theoretical framework. Paul Ricoeur's hermeneutic principle that "the symbol gives rise to thought" is applied to the analysis of particular recurrent metaphors in this mythic framework, such as the "candle," "fire," and "still point," showing how these images serve as intermediaries of metaphysical inquiry. The study also makes use of Lakoff and Johnson's Conceptual Metaphor Theory to systematize the interpretation of this imagery through the cataphatic and apophatic modes. This three-tiered method enables comparison that goes beyond thematic parallelism toward a source-critical and theoretically informed problematization of religious language. Together, these perspectives provide the analytical basis for interpreting how poetic language does not merely express pre-existing religious meaning, but actively constructs, mediates, and transforms metaphysical experience, thereby enabling a more nuanced comparison of implicit and explicit modes of religious expression in the works of Naim Frashëri and T. S. Eliot.

Methodology and Research Questions

This study delves into Albanian literature, employing a qualitative methodology that examines the selected poems of two authors, Naim Frashëri and T. S. Eliot, as key figures in both languages and cultures, with a focus on the expression of religious symbolism, metaphysical reflection, and explicit and implicit theological language in their poetry. Even though the comparison addresses both dimensions, the stylistic-poetic differentiation between explicit and implicit religious language is the primary analytical focus of the study. The selected poems were chosen because they emphasize religious and philosophical themes, are read by students, particularly those who are learning respective languages, and are representative of each poet's broader corpus. Through analysis of and attention to the language of cultural and spiritual contexts, the paper explores how these authors use and engage their poetic language with religious concepts, dilemmas, and metaphysical inquiry in order to examine whether there is a connection between the ways the two authors present and maintain respective linguistic expressions and religious perceptions and whether and how certain similar words develop structures and common motifs.

The central research question guiding this study is: How do these writers convey religious language and meaning through symbolism, metaphysical contemplation, and any implicit and explicit theological words in their poetry?

To address this question, the following analytical considerations are proposed:

1. Do these authors articulate theological ideas without explicit doctrinal language?
2. What types of symbols or motifs substitute for or complement direct and indirect religious language?

To address these questions, the study situates the language of the selected Albanian and English poets within its historical and spiritual context, showing how religious and metaphysical expression extend from literary traditions (Per-

sian, Indian, Hebrew, European) into their poetry. This relationship between continuity and change creates a more nuanced perspective on how poets engage with themes of religion and metaphysics. When their works are set side by side, the main hypothesis assumes that certain words and sentence patterns develop into similar or different forms of expression despite reflecting the same religious motif – unity of God. Moreover, the pairing hypothesis may connect to the assumptions that respective poetic texts serve not only to express common ethical and metaphysical concerns but also to draw on the importance of both unique literary heritages.

Implicit and Explicit Religious Language in the Poetry of Naim Frashëri and T. S. Eliot

A comparative study of religious language and expressions through Frashëri's selected poems *Falja*, *Fjalët e Qiririt*, and *E Vërteta* (from volumes 1 and 2), and Eliot's *Four Quartets*.

This section looks at how Eliot and Frashëri incorporate language into their poems to convey religious devotion and deep meditation. The analysis examines the respective language and wordings each poet uses to express their own spiritual experience, moral thought, and a feeling of the divine, considering both implicit and explicit religious references.

The comparison between the two poets aims to examine the functional role of language in mediating metaphysical meaning in addition to finding thematic parallels or variations in religious expression. In this way, religious language is analyzed as a mechanism of meaning – making; explicit discourse tends to directly assert theological positions, whereas implicit discourse uses symbolic, metaphorical, and apophatic structures that clearly call for interpretive engagement. This method enables the comparison to go beyond descriptive parallelism and instead focus on how their poetic language creates, mediates, and changes religious and metaphysical experience in various literary and cultural contexts.

The analysis demonstrates that religion functions as a foundation of poetic language shaped by cultural contexts. These contexts produce complementary metaphors and distinct stylistic strategies. The connection between words, meaning, and spirituality in the said Albanian and English poetry identifies influences and patterns in the ways that specific words convey faith, wonder, and human engagement with the divine.

Naim Frashëri (1846–1900) was one of the most important authors in Albanian literature. Although he was born and reared in an Albanian household, his intellectual development arose as an Islamic-Bektashi, eventually strongly influenced by Persian culture, particularly poetry. This turned him into a mystical and Bektashi theologian, as the epistemes of this culture clearly shaped his poetic, philosophical, and religious discourse, directing him to dedicate his initial works, such as *Grammatika e Persishtes* (*Persian Grammar*) and *Tehajylat* (*Reveries*) to Persian culture (Hamiti 2020: 10–11). Abdulla Rexhepi elaborates

on the topic of Naim Frashëri and Persian literary code arguing that historical facts show that in Albanian territories there were poets who wrote in Persian language and amongst them was Naim Frashëri, who applied and elaborated upon motifs and subjects influenced by Persian literary code, particularly by Mevlana Celaleddin Rumi. In this light, Rexhepi analyses how the concept of Vahdet Vuxhud (unity of existence) driven by Rumi had been used by Frashëri who was greatly influenced by Rumi but had never mentioned him (as his influencer), indeed (Rexhepi 2014: 87–89). Similarly, Kryeziu claims that Frashëri's writings and metaphysics have their origins in Islamic mysticism and Sufism. He also argues they are replete with direct metaphors, as even the titles of his poems contain such metaphors. This gives weight to Rexhepi's view arguing that these metaphors are often direct and self-sufficient and do not require the context of the poem to make sense (Kryeziu 1998: 14). On the significance, ideology, and analysis of Frashëri poems, Eqrem Çabej implied that French romanticism had influenced his work in addition to Persian influence from Islam Bektashi, though it is difficult to support the influence of French romanticism at that time (Çabej 2006: 104–112). Duijzings states that one of the primary sources of identity in the Balkans for centuries was religion and despite being a nationalist who sought to bring Albanians together, Frashëri also wrote religious texts that are important to consider in this regard. His writings, which frequently extol Albania's rural landscapes, a defining feature of romantic nationalism in the 19th century, incorporate Bektashi pantheist concepts, giving the poetry mystical undertones and "sacralizing" the Albanian countryside (Duijzings 2024: 210–211).

One of the most frequent words Frashëri uses in his writings is God. He primarily writes about God with high expressionism asking for his protection through expressive repetition; Islam pantheism, surrounds his idea and subsequent poetic descriptions that everything around is surrounded and created by God. This philosophy of enlightening the world can even be seen in the epic poems as one of the *History of Skënderbeu* is:

Since He created the universe,
great and true God also created Albania
and gave life to the Albanians... (Frashëri 1978: 7).

In these verses, Frashëri shows his Bektashi pantheistic view of world, which says that the divine is not detached from the world; to the contrary it is present in all forms of life. By saying that God loves people, creatures, and life itself, the poem shapes the line between the holy and the earthly, showing that nature, humans and natural life are all parts of a single, true holiness. Such explicit language sacralizes the natural and social world, transforming the land and its people into a space of presence of heaven and reinforcing a spiritual force that gives life, in this case to the nation, equaling it with an affirmative pantheism:

And humankind and livestock
 And all that exists in life
 I love them as God
 For wherever I turn my eyes
 I see there the true God
 Who is one and has no other... (Frashëri 1978: 76).

The Nobel laureate T. S. Eliot (1888–1965), on the other hand, is considered by many academics to be one of the greatest innovators of modernist poetry. In pursuit of a belief system that could command his intellectual commitment and practical adherence, he studied a wide range of Eastern and Western philosophical and religious traditions while pursuing his philosophy degree at Harvard, where he also completed a postgraduate program and briefly attended Oxford from 1909 to 1914. The years he spent studying fostered his deeper literary interests, particularly the growth of his poetic imagination and creative expression. Eliot joined Church of England in 1927 and in 1943 published the collection of poems *Four Quartets* which is regarded as a culminating masterpiece. His characteristic features included implicit language, juxtaposition, the aggregation of images, and rich symbolism with various motifs. Eliot's philosophy and understanding that a good poem may combine all the voices to strike a chord are reflected in his book *Selected Essays*, where he notes that poetry has three voices: one to himself, one to an audience, and the third to create a dramatic character (Eliot 1982: 74).

To this end, when two authors are compared, we come across different poetic viewpoint regarding the epistemic status of the divine. Eliot examines the interaction between humanity, the material world, and the divine via denial, contrasting with Frashëri's affirmative pantheism. Thus, while Frashëri observes God in all aspects of life and nature, Eliot's epistemic approach defines a journey to the divine implicitly, as rejection and humbleness, inferring obviously that the path to the unknown God is found in *unawareness, darkness, unknowing, and submission*:

In order to arrive at what you do not know,
 you must go by a way which is the way of ignorance,
 you must go by the way of dispossession
 in order to arrive at what you are not... (T. S. Eliot 1971: 29).

In light of this, both poets view the divine as intertwined with human existence through nature, but while Frashëri finds and identifies God with life, nature, and humanity including *cheerfulness, joy* and *beauty* in all aspects of existence, Eliot interacts with elements of earth, water and fire in a different way (*East Coker*-earth, *The Dry Salvage*-water and *Little Gidding*-fire). Eliot presents the divine's existence in moments when *human understanding weakens and cannot*

bear the reality, marked by themes of *doubt, dust, deception, death, emptiness* and *silence*. Despite their contrasting tones, it could be affirmed that both suggest that human life derives meaning through its connection to the eternal.

As implied in the above-presented verses, it is to be restated that Eliot employs apophatic theology in contrast to Frashëri's cataphatic approach. The "still point of the turning world" in *Four Quartets* (see below) is characterized by what it is not, that is, neither from nor towards, neither flesh nor fleshless; it is a Ricoeurian symbol of ineffability, and may also fall within Frye's broader mythos of time and eternity. Ricoeur's theory that "the symbol gives rise to thought" connects to this as the "still point" is a symbol that compels the reader to engage in a contemplative "thought" regarding the meeting point of time and eternity rather than offering a doctrinal definition; conveyed through negational irony, sequential descriptions, and fundamental allegory, God is surpassed; he points at divine connotation but without identifying the divine, allowing a sense of tension, silence, and repetition, such as: *go, go, go; quietly, quietly*, contrasting Frashëri's clear call to and for God.

In light of this, *Burnt Norton* seems to be the *Four Quartets*' most implicit in terms of religion and the "still point," as evidenced by the well-known lines:

At the still point of the turning world.
Neither flesh nor fleshless...
Neither from nor towards; at the still point,
there the dance is... (T. S. Eliot 1971: 15).

Yet, both poets could also be analyzed via Lakoff and Johnson explaining that "Light is Knowledge" (The Conceptual Metaphor).

Language of East Coker – Theological – Still Implicit

As in abovementioned cited verses (*In order to arrive at what you do not know; you must go by a way which is the way of ignorance...*), though expressed via implicit language, it still moves closer to more Christian theological wordings, as its religious meaning hints at conveying the message through *Adam's story/curse, humbleness, descent, denial, disease, purgatorial fires etc.* Thus, from close readings of the *East Coker*, Eliot seems to draw on apophatic theology, or knowing God through unknowing or negation. Even though God remains unspecified throughout much of the poem, the spiritual context in it is clearer than in *Burnt Norton*, thus carrying the religious presence and renewal implicit, yet structured by self-denying:

In my beginning is my end, succession Houses rise and fall, crumble, are extended, are removed, destroyed, restored, or in their place...old stone to new building, old timber to new fires, old fires to ashes, and ashes to the earth which is already flesh, fur and faeces... (T. S. Eliot 1971: 15).

Furthermore, this might be consistent with Frye's understanding of poetic time as a mythic structure as opposed to a linear sequence. According to Frye, contemporary poetry transforms conventional theological ideas, like the incarnation, into symbolic forms that break regular temporal continuity and enable the past and future to be combined into a meaningful present moment. Thus, it is possible to interpret Eliot's concept of the "still point" as a symbolic expression of this temporal pause, where transcendence enters and breaks into time, making the "real present" apparent, rather than as a doctrinal assertion (Frye 1990: 165).

Moreover, when reading *The Dry Salvages*, it may be interpreted as a transitional movement from implicit to explicit religious language, as in the verses below where Eliot moves from deeper implicit religious wordings of *East Coker* toward somewhat spiritually charged without naming God per se, still mentioning gods as plural and yet embedded in a symbolic narrative:

The function of an implicit religious language can also be examined through the pronoun usage as noted in the phrase "His rhythm," (see above) which indicates a nameless existence without a direct identification per se. This choice not only possesses grammatical simplicity but also hints at religious interpretation creating uncertainty. The latter is characteristic of Eliot's style, as it allows a broader range of interpretations, refraining from explicitly naming either God or Christ so that the implied transcendent existence is left to the reader's understanding. This deliberation in language effectively mirrors the nature of religious experience, which often emphasizes feelings and personal encounters over doctrinal definitions.

Another feature of this analysis may be connected through the concept of sacralization of everyday spaces which transcends the limits of traditional religious structures, such as churches. As a replacement for churches, it can be differentiated in various ordinary environments, including: —*a nursery bedroom—a dooryard—a garden*—all mentioned in the above verses. These spaces are representation of everyday home life and repetitiveness. In this context, Eliot involves a significant transformation, where the ordinary is infused with spiritual qualities. A divine rhythm is infused into the topics of *daily existence, times of childhood, memories, nature, the river, the sea*, its creatures and humans encoded with deep meanings of words of continuity, times, of *future as futureless when time stops and never ends* (Four Quartets: 36–37). In this light, it is to be argued that this approach bears structural similarities to Frashëri's conceptualization of the sacralization of landscape, although as specified articulated through different lens and wording.

On the other hand, *Little Gidding* is the least implicit and most explicit; most explicit in religious terms as Christian imagery of purgation, sin, and redemption dominates the poem. Fire is no longer just symbolic, but explicitly spiritual:

The dove descending breaks the air
With flame of incandescent terror
Of which the tongues declare
The one discharge from sin and error (T. S. Eliot 1971: 55).

As presented, at this point Eliot expresses more openly theological connotation, bringing the implicit style of the earlier quartets to an added spiritual determination and clarity. Related to this, *Little Gidding* approaches the level of a more explicit dedication which characterizes Frashëri's poetry, yet Eliot arrives there through modernist symbolism rather than direct pronouncement.

Continuing along the lines of the above, as far as the dichotomy of the implicit and the explicit content of religious language is concerned, the case of T. S. Eliot's *Little Gidding* (from *Four Quartets*, 1942; Part V, p. 59) and Naim Frashëri's *Falja* present similarities, still through different symbolism. Eliot often emerges his spiritual experience obliquely, shaped by deeper symbolism, metaphor, and the careful pace of meditation as in the following:

We shall not cease from exploration
And the end of all our exploring
Will be to arrive where we started
And know the place for the first time (T. S. Eliot 1971: 59).

The content of religious experience is evident in Frashëri's poetry, as in his writings God is prayed using overtly articulated words of wishes for support and moral strength like:

O Mighty and True God
May us be eternally grateful to you!
Grant us health and strength
Our friends and all humankind
Make us wise and virtuous
Fill our hearts with mercy.¹

The preceding sentence *Zot i math e i vërtetë* (Mighty and True God) is noticed to be the same and as the first verse of two poems in two separate collections: *Falja* (Prayer) (Frashëri, *Works*, vol.2 p.180) and *Perëndija* (God) (Frashëri, *Works*, vol.1 p.367). He has another poem named *Zoti* (God) (Frashëri, *Works*, vol.1 – “Ëndërrime” collection, p.64–65).

Except *Falja* (Prayer) where one does not need to argue as the words' directness show the sacral explicitly, the other two selected poems of Frashëri *Fjalët e Qiririt* (The Words of the Candle) and *E Vërteta* (Truth) could be delib-

¹ *Zot i math e i vërtetë* / Të qofshim falë përjetë! / Falna shënden' e fuqinë / Miqtë e gjithë njerëzinë / Bëna të urt' e të mire / Epna në zemrë mëshirë (Frashëri: 2000b: 180).

erated from the angle of holding more implicitly even though metaphors are obvious. Related to this, *Fjalët e Qiririt* (The Words of the Candle) center around the idea that the candle represents guidance, enlightenment and education, as it melts out unavoidably enlightening others. It is a Ricoeurian symbol that “gives rise to thought” about sacrifice, but it also can be included in the Frye’s archetype of light. In this poem, Frashëri also uses what Lakoff and Johnson refer to as a conceptual metaphor, mapping the “Target Domain” of mystical sacrifice onto the “Source Domain” of physical light and melting wax. The candle represents a cognitive structure hinting at that “Consumption of Self is Enlightenment,” not just a symbol. The imagery of this specific poem continuously maps characteristics of the candle onto the human situation. The act of “giving light” becomes a metaphor for moral and spiritual guidance since light is associated with knowledge and truth, whereas darkness is associated with ignorance and moral lack. The candle’s slow extinguishment also symbolizes human mortality, but this mapping is expanded when the poet asserts that they continue to exist “in the rays of truth,” implying that spiritual extinction differs from physical departure. Thus, the poem creates a logical conceptual metaphor, the self as a burning flame, through which divine existence, sacrifice, and knowledge are comprehended. By organizing recurrent symbols, this method not only reveals the internal logic of Frashëri’s imagery but also shows how metaphor organizes ethical meaning and reasoning, rather than merely enhancing poetic expression (*being amongst people I stand and burn out to grant light and to turn night into light*); through a very expressive explicit language, the positivity of enlightenment in everything and in everyone around him encompasses the entire poetry with optimistic religious and personal arguments: *candle, light, day, sacrifice, alive, soul, laughter, eating, drinking, God, soul, heart* and similar. Some of these verses have become national citing in everyday life: “Kur më shihni se jam tretur/When you see that I have vanished/ mos pandehni se kam vdekur/Do not think that I have perished”.

E Vërteta (Truth) brings forward the infinity of the world describing the heavens and earth in details with a direct metaphoric language and comparing figures on the mightiness of God *featured at every corner*; the poet calls upon people on importance of knowledge and frankness and honesty by using plain words, reinforcing God contrasted to devil almost at every stanza, reiterating acceptance of powers of God and consequently enlightenment. One of striking metaphorical comparisons over birth and death reads:

Like the scythe that cuts the grass, yet it springs again in countless seeds,
In every realm of the universe appears the power of God indeed.²

² Posi kosa që korrë barë, / dhe mbin prapë farë-farë, / Me çdo vend të gjithësisë / duket fuqi e Perëndisë (Frashëri 2000a: 282).

As perceived from the original selected poems, Frashëri through repeated calls and moral appeals makes his verses develop into a real act of devotion, which amongst readers does not leave any doubts around the poet's religious intent. In fact, the canon that God is the ultimate truth of which all other material worlds/universe and human beings are manifested from, proves that Frashëri is a profound believer that places God in the epicenter and through that exercised direct influence upon readers.

On the other hand, Eliot leads readers into deeper contemplations on the sacred, which may leave some 'doubts' over poet's intentions due to his indirectness and deeply rooted meditative poetics used throughout his poems.

Nonetheless, both poets' language and religious ideas exhibit "uniqueness yet sameness"; Frashëri expresses his theological ideas through more overt doctrinal language, whereas Eliot uses subtler and profound symbolical language without turning his writings into a doctrinal proclamation. Moreover, Frashëri's straightforward language serves a didactic and patriotic goal by bringing community together through a shared sacred vocabulary. Eliot's implicit language, on the other hand, has an epistemological function, reflecting the modernist effort to comprehend reality in a broken world where express naming appears insufficient.

A visual breakdown utilizing theoretical frameworks is used to present the following comparative analyses of the two poets. By combining lexical, conceptual, and functional distinctions, the following tables show how religious language operates in both cataphatic and apophatic modes across the two literary traditions.

Motif – The Godly

Naim Frashëri (Falja/Prayer, vol. 2, p. 180) / Explicit
Direct naming (God/Zot): "God, great and true, / May You be praised for life! / Give as health and strength / Friends and all humans, / Make us wise and good, / Grant mercy in our hearts / Give us all the wisdom, / The goodness and the knowledge, / Do not leave us in darkness, / Lead us to the right path..."
T. S. Eliot (East Coker, Parts II–III, p. 27–28) / Implicit
The "Still Point": "I said to my soul, be still, and wait without hope..." East Coker (II): "The only wisdom we can hope to acquire / Is the wisdom of humility: humility is endless."
Theoretical mechanisms / (The Why)
Direct versus symbolic representation of spirituality: Frashëri uses cataphatic affirmation (God is repeatedly invoked); Eliot uses apophatic negation to preserve divine mystery (the "soul" substitutes indirect reference to God); However, both poets ideate their language as a vertical movement toward transcendence.

Table 1: Comparative Lexical Analysis of the Divine (Direct vs. Symbolic)

Motif – Light/Fire

Naim Frashëri, <i>The words of the Candle</i> vol.1 p. 198, Explicit
“The Candle (Burning for Others)” “Just a bit of light to give you / That I change your night to daytime / Just to give you brightness, vision / That you notice one another / When you see that I have vanished, / Do not think that I have perished...”
T. S. Eliot, <i>Little Gidding</i> , part IV, p. 57, Implicit
“Pentecostal Fire” “The only hope, or else despair / Lies in the choice of pyre or pyre- / To be redeemed from fire by fire....”
Theoretical mechanisms (The Why)
Conceptual Metaphor: Light as moral guidance (Frashëri) versus Light as painful purification (Eliot). The candle of Frashëri with direct moral message through: illumination, knowledge, awakening, love and sacrifice (no ambiguity). Eliot’s imagery of fire, darkness, love disappearance, time but with tragic tone emphasizing, suspire, sin, etc.

Table 2: Conceptual Metaphors of Light and Fire (Moral vs. Painful Purification)

Motif – Continuity and Divine Presence

Naim Frashëri, <i>Truth</i> vol.1 p. 281–82, Explicit/Didactic
“... Like the scythe cutting the grass, / yet springing again in countless seed, / In every realm of the universe / the power of God appears indeed...”
T. S. Eliot, <i>The Dry Salvages</i> , Part II, p.38, Implicit/Apophatic
“There is no end to it, the voiceless wailing, No end to the withering of withered flowers, To the movement of pain that is painless and motionless, To the drift of the sea and the drifting wreckage...”
Theoretical mechanisms (The Why)
Frashëri: Uses cataphatic theology. The “Scythe” and “Seed” serve as a conceptual metaphor that maps heavenly vitality onto organic growth (Lakoff and Johnson). This functions as an affirmation mechanism: death becomes a prelude to renewed existence. Eliot uses Ricoeur’s symbolic mediation. The symbols “Sea” and “Withered Flowers” “give rise to thought” by defying simple interpretation. The “motionless movement”, where the divine is found in the stillness behind sorrow, serves as the mechanism by which his Apophatic Negation defines the infinite by emptying the finite.

Table 3: Mechanisms of Continuity (Organic Growth vs. Temporal Mystery)

In addition, and beyond a descriptive parallelism, the following table utilizes the shared conceptual framework to examine the functional role of religious language in both poets based on Ricoeur's hermeneutics and Lakoff and Johnson's theories. The table makes a distinction between the Symbolic Positivity of Frashëri's cataphatic affirmations and the Symbolic Paradox of Eliot's apophatic negations:

Category	Symbolic Positivity (Frashëri/Cataphatic)	Symbolic Paradox (Eliot/Apophatic)	Analytical Mechanism (The "Why")
Linguistic Approach	God's power is "given" through nature; the universe is a visible sanctuary.	Emphasizes "voiceless wailing" and "motionless movement" as ways to convey spiritual tiredness.	From Ricoeur's approach: Eliot employs symbols to "give rise to thought" by questioning logic, while Frashëri offers archetypal symbols with stable, manifest meanings (Frye).
Cognitive Mapping	Uses stable, easily identifiable imagery (seed, candle, scythe) to ground the divine in the physical.	Uses oxymoron and negation to remove actual meaning and to arrive at the indescribable.	Lakoff and Johnson: Frashëri maps Growth/Light onto Divinity ("Light is Knowledge" as a conceptual metaphor), while Eliot maps Paradox/Stillness onto Transcendence.
Epistemic Status	Affirmation: Direct naming (God) serves to unify and clarify the sacred.	Negation: Indirect suggestion (The Still Point) serves to preserve the mystery of the divine.	Hermeneutic-Theological Mode (Ricoeur): Moves from the cataphatic (God is revealed) to the apophatic (God is hidden/unknowable).
Symbolic Power	Uses direct moral messaging for educational purposes; the "Candle" functions as a direct moral guide.	Uses the "Sea" as a symbol of time-based paradox, suffering, and continuity.	Ricoeur/Frye: Frashëri uses Archetypes (Frye) to address (pedagogical in a structural and analytical way); Eliot uses Symbolic Mediation (Ricoeur) to provoke thought.

Table 4: Functional Framework of Religious Poetics

To summarize the analytical “whys” that underlie the tables, it can be inferred, especially from Table 4 that the identified features show an interconnected structure among the categories. As shown, rather than their level of devotion, the two poets’ epistemic positioning differs according to their poetic discourse. While Eliot’s symbolic paradox uses the “still point” to engage the reader in Ricoeurian mediation where the lack of a precise definition invites a deeper metaphysical encounter, Frashëri’s symbolic positivity uses the archetype of the flame to ground collective faith.

Conclusion

Religion and metaphysics are recurring themes in both English and Albanian poetry. Naim Frashëri and T. S. Eliot, representatives of both literary worlds, are regarded as among the most studied and influential poets as their works and personalities are widely prized. This paper aimed at advancing a different approach by analyzing both authors with a comparative viewpoint on their religious and metaphysical explicit and implicit language expressions through selected poems.

Because of its spiritual, anthropological, and patriotic themes, religion, particularly Persian literature, had a significant influence on Naim Frashëri’s poetic language and, in turn, on readers. Thus, it is no accident that Frashëri’s influence is referred to in academic circles as the “Naimian era.” This study recognizes T. S. Eliot’s Nobel Prize-winning poetic achievement as a central point of reference for the English literary context, concentrating on his *Four Quartets* as one of the most developed syntheses of his theological and symbolic language.

The language of symbols, theological themes, and metaphysical ideas in the works of both poets demonstrate the “uniqueness yet sameness” through a final comparison. The study suggests that Eliot uses more implicit, apophatic, and profound symbolic language without turning his writings into a doctrinal statement by applying the framework of symbolic mediation and conceptual metaphor. Frashëri, on the other hand, expresses his theological ideas using language that is more doctrinal, precise, and cataphatic. In the end, both poets show how poetic language serves as a bridge between the divine and human experience, demonstrating that although their linguistic modes have different epistemic statuses, they are united in their quest for metaphysical truth via the power of symbol.

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Mythology, Religion, and Women’s Liberation: An Archetypal Reading of Three Contemporary Greek Novels

Abstract: This paper uses as a starting point Annis Pratt’s concept that “the novel performs the same role in women’s lives as do the Eleusinian, dying-god, and witchcraft rituals,” providing the reader with “the potential for personal transformation” through its archetypal patterns. Specifically, it explores three contemporary Greek novels that deal with women’s liberation and development and employ ancient mythology and Christian religion motifs to enhance their messages and narrative structure. First, it looks at feminist author Lena Divani’s novel *The Women of Her Life* (1997), which relates intertextually to Dante’s *Purgatory* and bridges 13th century Christian imagery with the personal purgatory of a woman trying to understand herself and her life beyond social prescriptions. Christian imagery as well as ancient Greek mythology motifs plays a central part in the awakening process of the female protagonist in Eugenia Fakinou’s *The Great Green Sea* (1987)—a story about an artist who reproduces Byzantine icons and embarks on a journey of self-growth. While Fakinou and Divani draw symbols from ancient Greek and medieval Christian traditions, anti-feminist and atheist Lili Zografou opposes and rejects the Orthodox doctrine—especially its moral teachings—in both her fictional and non-fictional writing and, inspired by studies on matriarchal societies, promotes women’s power, sexuality, and self-sufficiency, thus elevating the feminine almost to the state of a cult. Her novel *Love Arrived One Day Late* (1994) is presented as a counterpoint to the works introduced earlier, followed by concluding remarks on the adoption of religious ideas and symbols by different female writers in their literary projects, fostering women’s search for authenticity and self-realization.

Keywords: *contemporary Greek literature, women writers, novels of self-discovery, mythology, religion*

The article examines three contemporary Greek novels by female writers with female protagonists on self-discovery journeys with a focus on the role of religious and mythological motifs in the narratives. Over the last two centuries, Greek literature has productively blended the ancient Greek cultural heritage and the Orthodox tradition (Beaton 1996: 21). The works I have chosen to present are centered around women’s quests for freedom and psychological wholeness. As we shall see, each author draws different themes from the mythological and religious thesaurus in accordance with the messages she wants to convey. Moreover, even when the plotlines and the characters are not explicitly deal-

ing with religious and/or mythological themes, the novels are still informed by mythopoeia if we adopt the concept of the reading process as being experienced as an initiation in the mythic dimension. As Italian philosopher Giorgio Agamben argues, “[j]ust like the initiated [...] penetrated mystery and found in it the hope of having his life saved, so the reader, following the series of situations and events that the novel weaves pitifully or ferociously around its character, somehow participates in his destiny and, at any rate, introduces his own existence to the sphere of mystery” (Agamben 2017: 3). Feminist researcher Annis Pratt discusses the same idea but shifts its focus to the impact of reading on women’s lives. She suggests that women novelists “have made of the woman’s novel a pathway to authentic self, to the roots of our selves beneath consciousness of self” (Pratt 1982: 178) and this hypothesis is the starting point of the following analytical reflections.

In 1997, university professor of history and feminist Lena Divani publishes her first novel *The Women of Her Life* (*Οι γυναίκες της ζωής της*). The protagonist, Anna, embarks on a quest for truth upon discovering her husband’s affair with a younger woman. This quest is structured in seven chapters, titled “Seven Steps in the Darkness” and framed by an “Entrance” and an “Exodus.” While the heroine herself does not hold any religious beliefs, Divani parallels her journey to Dante’s *Purgatorio*, employing verses from the medieval text as epigraphs. Each chapter is named after one of the seven deadly sins—although their order does not mirror the way they appear in the Dantean mythography—and follows Anna’s ascent in her personal purgatory through the lens of seven viewpoints: the heroine’s and those of six other women’s.

While the seven terraces of Mount Purgatory begin with the terrace of pride and end with the terrace of lust, the seven chapters of the novel present the reader with an implicit Dantean resonance by subjecting the moral categories to “the needs of the narrative” (Barolini 1992: 34):

- Chapter I. Envy: *But you would take the bait,
so that the hook of the old adversary draws you to him;* (canto XIV)
- Chapter II. Wrath: *What shall we do to one who’d injure us
if one who loves us earns our condemnation?* (canto XV)
- Chapter III. Sloth: *... and those who did not suffer trials until the end
gave themselves up to life without renown.* (canto XVIII)
- Chapter IV. Lust: *Why are you only
so eager to behold the living lights
and not in seeing what comes after them?* (canto XXIX)
- Chapter V. Gluttony: *... she clasped my head, and then she thrust me under
to that point where I had to swallow water.* (canto XXXI)
- Chapter VI. Pride: *Why does your mind presume to flight
when you are still like the imperfect grub...* (canto X)

Chapter VII. Avarice: *But if you still persist
in letting your mind fix on earthly things,
then even from true light you gather darkness.* (canto XV)¹

Anna's journey begins with an attempted suicide after the discovery of her husband's infidelity and ends with a near-death experience on the "terrace of avarice," when her ambition to prove herself causes heart failure. On the "terrace of envy" she tries to comprehend and look like her rival. In "Sloth" she becomes apathetic and lethargic and lives on antidepressants. In "Lust" she tries to seduce a married man, but, ironically, the man rejects her out of fear of destroying his marriage. In "Gluttony" she is punishing her body for not being attractive enough for her husband by overeating, while in "Pride" she is an overambitious postgraduate student at Harvard and an anorexic; the body is punished again—this time with hunger. This hunger is the outer manifestation of the inner hunger that fuels her aspirations to climb the ladder of success in "Avarice,"² from which, however, she unexpectedly (and almost lethally) falls.

Thus, after the suicide attempt in "Entrance" and the crossing of the modern terraces of the seven vices ("peccata"), the circle of the plot closes with the mythic rebirth-after-death. The epigraph of the "Exodus," where her "resurrection" takes place, is from a Christian Orthodox funeral service ("Always more deceptive than a dream..."), but it is *Purgatorio* that provides the basic structure of her journey. In the context of Divani's novel, the *Commedia* is stripped of its religious connotations and the seven epigraphs function as pointers to the universality and timelessness of the human condition. As Teodolinda Barolini notes, "[t]he *Commedia*'s work of creating a virtual reality, of encouraging its readers to feel that they are journeying along with Dante, begins with the metaphor of life as a path on which we all walk. [...] The experience of life as a journey through time and space is an experience shared by all" (Barolini 2018). And since "one text is potentially capable of several different realizations, and no reading can ever exhaust the full potential, for each individual reader will fill in the gaps in his own way" (Iser 1980: 280) the reader acquainted with the *Commedia* may trace the "constellation"³ of freedom and the birth of the new self in Divani's text as well as in Dante's because "[t]he second realm offers saved souls the opportunity to work toward freedom. [...] This is the place where everyone is working on becoming new again" (Barolini 2014). Moreover, "Dante poeta" is "backed up" by another

¹ For the sake of convenience, I cite an English translation (see the bibliography below); the author, however, uses a Greek translation.

² "No one is hungrier than me," Anna confesses to her boss (Divani 2009: 330).

³ "[T]wo people gazing at the night sky may both be looking at the same collection of stars, but one will see the image of a plough, and the other will make out a dipper. The 'stars' in a literary text are fixed; the lines that join them are variable" (Iser 1980: 282).

world-renowned poet—Rainer Maria Rilke whose *Letters to a Young Poet* provide the novel's opening epigraph: "And now I give you that copy, because I know that it is important and makes for new experience to find one's own work again in someone else's hand-writing."

The next journey we are going to follow, tracing its religious and mythological motifs, is that of the female artist Ioanna—the central character in Eugenia Fakinou's *The Great Green Sea* (*Η μεγάλη πράσινη*, 1987). The heroine is a painter who diligently copies Byzantine icons which in turn are sold by her husband. This occupation is not her choice but her pragmatic mother's who insists that Ioanna prioritize security and stable income instead of following her dreams. The girl is so afraid of losing her mother's love that she does exactly that—abandons her dreams, suppresses her creative nature, and settles for a marriage of convenience and a craft reproduction business. The focal point of the text is her awakening to her true artistic nature and authentic individuality and at first glance the Byzantine iconographic canon, with its strict prescriptions regarding themes and colours, represents the stagnation and rigidity of her psyche. However, a close reading of the text reveals a more complex web of implications.

The protagonist's quest for authenticity and self-realization is actually triggered by an icon—the reproduction of Salome, assisting in the birth of Christ. The awakening process, or "the call to adventure" to put it in Joseph Campbell's words (Campbell 2004), begins when Ioanna unconsciously gives her own features to the biblical midwife. Slight modifications in other reproductions also make their way from the realm of the unconscious to the canvas, signalling the need for change; as a result, the potential buyers for these "unorthodox" icons gradually diminish. Not only does she lose the financial safety of her life, but also her dreams (both daydreams and night dreams), which sets her on a self-discovery journey, and its first stop is the Byzantine monumental complex of Mystras with its seven medieval churches, in one of which the original of the *Nativity* icon is kept. The storyline will closely follow Ioanna's inner transformation, which implies the process of rebirth to a new identity, so the visit to this particular place and the spending of the evening in front of this particular icon are laden with connotations.

As the birth of Christ (symbol of the Self in Jungian psychoanalysis)⁴ is helped by a midwife, so the psychological rebirth ("renovatio" to use another Jungian concept)⁵ of Ioanna is assisted by one of the nuns in Mystras. The heroine confesses her "deviant" impulse to depict herself in the place of Salome bathing the newborn Christ to Sister Kalimahi—an artist, a restorer of icons, and a wise mother figure. The old nun does not reprimand her; on the contrary,

⁴ See, e.g., Carl G. Jung, *Aion: Researches into the Phenomenology of the Self* (Princeton: Princeton University Press, 1979).

⁵ See Carl G. Jung, *Arhetipovete i kolektivnoto nesaznavano* (Pleven: EA, 1999), 122–123.

she recognizes the birthing labours of the younger woman's inner artist and encourages her search for self-expression.⁶

And so, the heroine goes on with her journey and finds herself in a village by the seaside where she discovers a haunted house, shunned by the villagers. There she stops to rearrange her psychic and creative reality in silence and isolation, and gives birth both to new paintings and to a new self.⁷ Her symbolic birth takes place, on the one hand, in the mythic dimension, "in illo tempore" (Eliade n.d.: 15–32), through the figure of the biblical midwife; on the other hand, however, the religious-themed painting is shed as the inhibitor of her creative nature.

The synthesis of ancient Greek and Christian mythological motifs, informing Fakinou's fictional world (Chryssomalli-Henrich 2003: 199), manifests itself in this text in the form of another source of inspiration for Ioanna—Medusa. The head of the Gorgon finds its way into one of Ioanna's paintings, where the latter places her next to the figure of a lying gypsy to whom the reborn heroine has given again—after Salome—her own features.⁸ Thus, her rebirth is assisted by both the Christian and the ancient Greek art. Furthermore, not only do the characters and symbols of Christian origin not form a homogeneous amalgam, but they sometimes clash with each other, challenging the reader's interpretation.

While the nun Kalimahi functions as a fairy-tale magical helper in Ioanna's journey, the priest of the village, who could be read as the embodiment of the dominant religious mentality, does not even notice the heroine when they first meet in the local tavern because he is deeply preoccupied with another rebellious female—his own daughter. Her ambition to go to the city and study engineering troubles the priest and reinforces the motif of the frightening power of the liberated female desire, emerging in the artist's laborious awakening: "How can you tame a river that flows wildly? [...] How can you stop a girl who wants to leave?" (Fakinou 2004: 13). Unlike the ambiguous end of Ioanna's adventure—the text leaves her naked and defeated on the seashore,⁹ and we never know whether she recovers from the trauma and goes on with her art—the girl manages to escape the rigid gender-role scripts and pursue her dream. Between the lines of her escape glimmers the hope of women's liberation if not for the protagonist and her generation at least for the next one and the future to come.

Now let us move on and finish with a female writer who was threatened by the Greek Orthodox Church authorities with excommunication. The pillars of Lili Zografou's belief system could be summed up as: atheism, hedonism, and neo-matriarchalism. Not only does Lili Zografou condemn all religions as outdated and

⁶ For a discussion of the figure of the female artist in Greek literature, see: Kastrinaki 2004: 152–163.

⁷ For a detailed analysis of the heroine's process of awakening, see: Anastasopoulou 1991: 3–19.

⁸ The painting functions as an intertextual representation of *The Dream* (1910) by Henri Rousseau; for further discussion, see: Hristova 2025: 31–52.

⁹ The woman artist narrowly escapes a lynching, triggered by suspicions that she was somehow involved in the disappearance of the priest's daughter and a young man from the village.

authoritarian,¹⁰ but she also creates female characters who hate and oppose the Orthodox Church and dogma. Her last novel *Love Arrived One Day Late* (*Η αγάπη άργησε μια μέρα*, 1994) has been republished 47 times to date and was turned into a series by Greek national television ERT in 1997. A short foreword on the second cover informs the reader that they are holding in their hands “an old-fashioned story that unfolds like a fairy tale” and that the main character, “subject to her impulsive instincts,” becomes—without knowing it!—a “conqueror of the most essential freedom. Because freedom [...] always comes not from unions and loud manifestos, but from personal realization, which ultimately chooses a morality of its own, without regard to externally imposed prohibitions” (Zografou 1994). This “morality of its own” is the leitmotif of her fiction as well as her non-fiction writing. Even in her interviews, Zografou tirelessly speaks about sexual pleasure as a prerequisite for human/women’s happiness (Lamprinou 2017). In her personal crusade against the Church’s moral prescriptions and the institution of marriage, the author looks for allies in the prehistoric times when sexual freedom allegedly reigned before patriarchy took over and forged new moral laws.

It is not a random choice that the plot is set in a Cretan village. Zografou herself was born in Heraklion, but more importantly the island of Crete, which “regards itself as an idiosyncratic and proudly independent part of the national entity” (Herzfeld 1988: 6), may be regarded as a fortress of Greek patriarchal mentality with its fixation on men’s masculinity and women’s subordinate position.¹¹ The female protagonist, Erato, whose name translates as “she who awakens desire” and reads as an anagram of the Greek word for love (*έρωτας*), is the eighth child of a tyrannical, narrow-minded shoemaker, Michailos, namesake of Kazantzakis’s famous captain Michalis—the epitome of masculinity in Greek literature. Her mother Erifili, on the other hand, is the epitome of the writer’s ideal of femininity; she is the perfect Mother. The concept of motherhood is fundamental in Lili Zografou’s writing. As she argues in her last non-fiction book *From Medea to Cinderella: The History of Phallus*, at the root of patriarchy’s misogyny is men’s envy of women’s ability to give birth:

The Greeks, fathers of civilization, degraded and debased themselves, consumed by this hatred, expressing it like a spit in all directions. [...] The Greeks felt they were greatly wronged by the division of roles between men and women. The fact that nature had assigned women the task of giving birth, even when they discovered that men were the ones who sowed the seed, was inconceivable to them (Zografou 2021).

¹⁰ “Over the last two centuries, humanity has progressed so much, demystified and tidied up the human mind with logic and scientific thinking, with the result that we now know that gods and religions served primitive man and his ignorance in interpreting the inexplicable. [...] Then, over the centuries, religions became a means of exploiting and subjugating humanity, suppressing spiritual enrichment and hindering progress in general” (Lamprinou 2017).

¹¹ For further discussion of the subject, see: Herzfeld 1991: 79–97.

This argument—of female biological superiority—is a thread that could be traced in her other works as well but for the moment let us focus on *Love Arrived One Day Late*.

Although the novel begins like a fairy tale, the story takes place in a very concrete time: the years before, during, and after the Second World War. One day, during the wartime, the fifteen-year-old Erato discovers an Italian soldier hidden in the basement by her sister Penelope. What follows could be defined as an initiation in sexual love but might also be seen as an echo of an idea Zografou writes about in *From Medea to Cinderella* and clearly admires—the idea of the so-called “erotic hospitality,” (*ερωτική φιλοξενία*) characteristic of matriarchal societies according to her research sources (Zografou 2021). Out of the “erotic hospitality” a child is conceived and, in order to save her daughter from the wrath of the father and the hatred of the villagers, Erifili pretends to be pregnant so that later she can claim the baby as her own. Thus, Erato is saved from punishment by her harsh father, but as soon as her protective mother dies, she is left at the mercy of her eldest sister Aspasia who steps into Michailos’ shoes and starts acting like her father.¹² Aspasia alienates her from her daughter by raising and brainwashing her into the conventional patriarchal value system in which hierarchy and social status hold supremacy. In her jealousy of her younger sister’s beauty, she goes even further by ordering her brothers to take her to Athens for hymenoplasty. But the final blow for Erato is delivered when her sister chases away her Italian lover Tonino, who returns after the war’s end to fulfill his promise of marrying her. Hurt and overwhelmed with anger, the heroine leaves the village and seeks refuge in a monastery with a very suggestive name: *Παναγία Καλογεννούσα*, meaning literally “Holy Mother who gives good birth;” the prosonym *kalogennousa* is also a dialect word for “weasel.”

Zografou (who as a child was sent to a Catholic boarding school in Naxos) never misses a chance to ridicule the church. As I already mentioned, her heroines are atheists just like herself, so her readers might be surprised when presented with the benign figure of the mother superior, who kindly allows Erato to stay at the monastery and advises her like a spiritual mother would have done. The depiction of a seemingly kind clergywoman, however, is part of a subversive strategy which aims at discrediting the church and blaming it for adding to the heroine’s suffering. Following her advice, Erato accepts a marriage offer from the monastery’s legal adviser who, on finding out about the sewn hymen, “pleads cheated” and starts raping her brutally as a form of revenge. The sadistic rapes enact the author’s views on the “social rape of women” stated passionately in *From Medea to Cinderella* (Zografou 2021). After the termination of her brief and nightmarish marriage, the heroine returns to the monastery and accuses her spiritual mentor of conspiring with

¹² Captain Michalis’ daughter is likewise described as willing to “act like her father”, see Kazantzakis 2021: 52.

and purposefully guiding her into the hands of her cruel husband. Zografou's social critique is transparently declared in the nun's reply: "As far as the law and the church are concerned, you are still his wife, and it is your duty to go back to him" (Zografou 1994: 132). Her voice is even more audible when Erato proclaims her mother Erifili an "anti-saint" (*αντιαγία*) "because saints and God have inhuman demands of mortals, while our mother [...] knew how anti-human it is to be infallible" (Zografou 1994: 109).

Thus, through the monastery and its mother superior, religion is presented as patriarchy's accomplice in stifling women's desires for freedom and pleasure. The name of the monastery, pointing explicitly towards the power of birthing and implicitly towards the cunningness of a weasel, could be read as irony, employed by Zografou to show—and lament—how the female "biological superiority" has become a tool and a weapon in the hands of the male-centered Greek society. "The fact remains that being born a 'woman' in Greece is [...] a biological accident," insists "passionate anti-feminist" Lili Zografou (Zografou 2021).

The novels examined in this study demonstrate that the mythic dimension is present in the three texts in the quest myth which, according to Northrop Frye, is the central myth of literature (Frye 1991: 512), while religion—as institution and tradition—is shown as both supportive of and obstructive to women's journeys to freedom, and sometimes as absent in them, depending on the authors' intentions. We saw that Anna's quest for the truth did not cross the path of the Orthodox Church; Ioanna was empowered by the old nun in Mystras and ignored by the village priest, while Erato was tricked by the mother superior into marriage and sexual slavery. Each narrative employs and discusses religious themes and characters in accordance with its needs and objectives. The manifestation of the mythic dimension, however, could be traced even deeper than the narrative structure if we view the reading process as an initiation ritual, as Agamben and Pratt suggest. By immersing themselves in the heroines' stories, the readers are provided with prompts for self-reflection and deconstruction of the conventional worldview, and ultimately with "the call to adventure."

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Muslim Women Today: Between Sharia and Feminism

Abstract: The study counterposes Islamic law and Islamic feminism. First, we focus on some Qur’anic texts concerning women’s status in Islam. Then we look at the shift in the perception of women’s rights brought by the Arab Awakening. Finally, we analyse the current discourses that unfold around the religious world-view of Muslim women and their emancipation. For this purpose, we problematize, on the one hand, works that examine the application of Sharia norms to Muslim women, and on the other hand, classic analyses of Islamic feminism and its direct impact on the position of women in society. It is obvious that Islamic law and Islamic tradition limit women’s rights. However, despite the religious pressure, the rights of Muslim women should become a priority not only of feminist discourses and women’s movements, but also of the state policies. The place of Muslim women in the social life does not deny her characteristics as a guardian of the home hearth, but opens her to the world, while at the same time keeping her in the Islamic tradition.

Keywords: *Arab Awakening, Islamic Feminism, Muslim Women, Sharia, Women’s rights*

Introduction

The events of recent years, especially the increase in migration flows in Europe, have made it ever more important to examine the diverse social, cultural, and religious experiences of Muslim communities. As contemporary European societies become pluralistic, questions of integration, social cohesion, and religious freedom have assumed growing significance. How do members of religious minorities integrate into societies where their faith differs from the dominant religious tradition? How do they integrate into the social order of countries in which secular authority is not subordinate to religious authority? What role do Muslim women play in civil society? How do they interact with the wider society?

Within many interpretations of Islamic tradition, special emphasis has historically been placed on women’s roles as wives and mothers responsible

for the upbringing of children in accordance with Islamic ethical values. At the same time, these roles have been interpreted differently across historical periods, legal traditions, and cultural contexts. The education and emancipation of Muslim women are particularly relevant, as they have enabled many women to renegotiate gender roles, expand their participation in public life, and contest traditional forms of male authority and gender inequality.

Expanded access to education and greater participation in public life have enabled many Muslim women to engage more actively in religious, social, and professional spheres while continuing to negotiate the relationship between religious commitment and contemporary social realities. In this context, education represents not only a means of personal development but also an important factor in strengthening women's participation in society and broadening their opportunities beyond the domestic sphere.

Against this background, the present study examines the relationship between Islamic law and Islamic feminism. For this purpose, we first focus on some Qur'anic passages concerning women's status in Muslim societies. Next, we study the change generated by the Arab Awakening in the perception of women's rights. Finally, we explore contemporary scholarly discussions on Muslim women's religious identities, agency, and level of emancipation. We problematize, on the one hand, works that consider the application of Sharia norms to women's roles (Wadud 1999; Esposito 2011), and on the other hand, works that analyse Islamic feminism and its direct impact on the position of women in society (Mernissi 1991; Ahmed 1992; Mahmood 2005; Badran 2009). Thus, the study adopts a contextualized interpretive approach based on the qualitative analysis of selected Qur'anic passages and the critical examination of the scholarly literature on Islamic law and Islamic feminism. By comparing different religious and academic interpretations, the study highlights the plurality of perspectives shaping contemporary Muslim women's rights, identities, and social participation across diverse historical, legal, and socio-political contexts.

Basic norms of Islam

Basically, the entire life of Muslims is governed by Sharia—the Islamic law that combines the moral, religious and legal norms of Islam; regulates the existence of both men and women; establishes the criteria for classifying social activities; manages the state administration and so on. Firmly rooted in the Qur'an, Islamic law governs the ummah—the community in which all Muslims are equal in relation to God, regardless of gender, race, social status, etc.

In the Muslim world, it is not the individual but the family that is the smallest unit of society. So everyone should consider their family's interests. From the Islamic point of view, by entering into marriage a devout Muslim gets closer to Allah. The marital union is perceived as a righteous deed, an act of responsibility and dedication. If spouses are good to each other, they will be good citizens. Like any social union, marriage requires a person in charge. The Islamic tradition bur-

dens men with this task: “Men are the protectors and maintainers of women, as God has given some more than others, and because they spend from their wealth” (Qur’an 2014: 4:34). Islam attaches great importance to marriage in the lives of Muslim women. Allah has created women for the attainment of peace and comfort in the family, as they are not only wives but also partners of their husbands. The woman in Muslim society is placed on a pedestal precisely in view of her role in the family, which is complementary and not subordinate to that of the man.

As well as being an exemplary wife, a Muslim woman must also be a good mother. She is responsible for the upbringing of children and their preparation for life according to the requirements of religion. One of her tasks is to convey to her children the basic moral values of the Islamic religion so that they may lead a righteous life. Muslim mothers should understand and practice the Islamic religion well so that their offspring can emulate them and be proud Muslims. In this regard, the Qur’an says: “Command your family to establish prayer, and steadfastly maintain it. We don’t ask you for provision; We provide for you. The outcome is for righteousness” (Qur’an 2014: 20:132). However, it is not stated that childcare is a woman’s exclusive and sole function.

In addition to the already mentioned roles, the Muslim woman has one more: before becoming a wife, mother and housewife, she is someone’s daughter. The birth of a female child in a Muslim family is considered a blessing from God. According to tradition, Allah promises a reward and access to paradise to all who help raise daughters: if Allah had not blessed the female children, Fatima would not have been allowed to continue the Prophet’s bloodline (Zoepef 2016: 42). Therefore, according to Islam, it is necessary for girls to be brought up and raised with a lot of love in accordance with religious values.

The reforms introduced by the Qur’an and the hadiths undoubtedly have a beneficial effect on the woman’s position, nevertheless she stands lower than man and she is not completely equal to him. Prior to the formal conversion to Islam, a man had the right to deny his wife the fulfilment of his marital obligations for a long period of time without divorcing her. The Qur’an limits the time a husband has to decide whether to stay with his wife: “Those who vow to abstain from their wives have a waiting period of four months. If they reconcile, then indeed, God is Forgiving and Merciful. If they are resolved for divorce—God is All-Hearing, All-Knowing” (Qur’an 2014: 2:226–227).

The Qur’an and the hadiths granted Muslim women more rights than Islamic law subsequently granted them. In the first years after the adoption of Islam, Muslim women prayed alongside men in mosques¹. During the time of

¹ Today, women pray in separate rows because mixing them with men could create an inappropriate situation. When Muslim women pray in front of men, certain movements may inadvertently expose parts of the body that are meant to remain covered. If the mind is distracted from the prayer, it deviates from the straight path of worshipping Allah. To avoid inconvenience and aid concentration, Islam commands Muslims to pray in rows, with men standing in front, children behind them, and women in the back (Badamasluy 1998: 10).

the Prophet Muhammad, women could provide shelter to men engaged in trade and other activities related to travel, and therefore they could come into direct contact with them. The Prophet's wives held key political roles: his first wife, Khadijah, was the first person to convert to Islam and she helped Muhammad's prophetic work through tangible economic and political support. So, the improvement of the Muslim women's status should be determined not so much by their current situation but rather by the rights originally given to them by the Qur'an and the hadiths.

The main theme of the fourth surah of the Qur'an, entitled "Women/An Nisa"², refers to the female part of the ummah. Various references to Muslim women can be found in over two hundred verses of the Qur'an addressing their rights and duties, their civil and social responsibilities, inheritance rights, marriage, dependency on their husband, punishments, divorce, etc. However, there are verses in the Qur'an that clearly emphasize the superiority of men over women. In the second surah, "The Cow/Al Baqarah", for example, it is said that "Women have rights similar to their obligations, according to what's fair, but men have a degree over them" (Qur'an 2014: 2:228). Male superiority is usually interpreted by Muslim scholars in relation to the following statement: "Men are the protectors and maintainers of women, as God has given some more than others, and because they spend from their wealth. Righteous women are obedient, guarding in absence what God would have them guard" (Qur'an 2014: 4:34). This inequality ends up being the turning point in the relationship between the two sexes in the Islamic context, since in this verse the woman is placed lower in the social hierarchy than the man. There are other verses in the Qur'an that show the unequal position of women compared to men, in cases such as testimony in court, inheritance rights, right to divorce, physical abuse, and so on.

Sharia plays a fundamental role in building the social and religious status of the Muslim woman. As a woman professing the true faith, she must observe the traditional wear. When leaving her home, she must put on a veil to protect herself from male gazes: "O Prophet, instruct your wives, daughters, and the believers' women that lengthen their garments, so they may be recognized and not be harassed" (Qur'an 2014: 33:59). The Qur'anic injunction on the veiling of women expressed in the surah "The Confederates/Al Ahzab" originally referred only to the wives and daughters of the Prophet, the women of his family and those of higher rank in the community. Veiling highlighted their special status. It distinguished them from women of the lower classes and from female slaves, for whom it was not only optional, but not permitted during the years of the initial establishment of Islam as a religion. Subsequently, the Sharia mandated the rule to be observed by all women as a distinguishing mark of the believers from the disbelievers in Allah. Thus, veiling becomes a symbol of religious distinction through which Muslim women show their belonging to Islam.

² In fact, out of all 176 verses in the surah, only 22 refer directly to women.

Clothing fulfils a moral function in the ummah: the preservation of honour. Veiling protects Muslim women from the indecent behaviour of men whom they may accidentally meet on the street or who have come to their home. The veil therefore appears as a necessary means of maintaining social order in the community, which, by separating women from men, ensures their ability to move in the public space and minimizes the likelihood of them being disturbed. In Saudi Arabia, Oman and Afghanistan, for example, women are required to cover themselves from top to bottom when going out, wearing an abaya³, niqab⁴ or burqa; to be accompanied by their husband or another male family member; not to converse with men to whom they are not related by blood. All these rules limit their rights in the public space.

Why is such a division of men and women necessary in Islam? The established segregation between men and women in Arab-Muslim societies is associated with the concept of the superiority of men, which precludes the social equality of the sexes. As we have already noted, the family is the basic unit of society in Islam; natural reproduction is accomplished through it. Therefore, the boundaries that predetermine the roles of men and women, and the separation of the private space of the family institution from the public one, are imposed to preserve the Islamic social order. The socio-cultural norms of Islam are related to gender difference and to the standards of masculinity and femininity determined by the “nature” of men and women. Male and female believers are equal in their faith in the eyes of Allah, yet they perform different functions in society. While men are naturally destined to occupy leadership positions in both public and private sector, and are charged with the responsibility of financially supporting the family, women’s primary role is centred on being wives and mothers, and caring for the home and the children.

From a contemporary point of view, it can be said that these practices aim rather to preserve the honour and dignity of men themselves than to prevent assaults on the purity of Muslim women. Gender segregation and veiling make it easier for Muslim women to move in the public space. By wearing a veil, they become “invisible” and can remain undisturbed. Veiling in Islam is a normative act imposed over the centuries by Muslim religious authorities, and an essential element in preserving decency and observing morality.

Arab Awakening and Muslim women’s rights

Modernity and colonial expansions necessitated the rethinking of several precepts related to Muslim identity. Between the middle of the 19th and the beginning of the 20th century, initially in Egypt, and subsequently in the Ottoman Empire, Syria, Lebanon and other countries, the so-called Arab Awakening

³ A traditional loose garment covering the whole body but leaving the arms and face exposed.

⁴ The niqab covers the entire body, including the head and the face, leaving only one slit for the eyes.

(al-Nahda) emerged. The modern debate about women's rights in Islam is rooted precisely in this cultural revival.

The encounter with Western culture gave impetus to the revision of socio-cultural traditions in the Middle East and led to changes that became a prerequisite for the discussion of women's rights in Muslim societies. The debate developed at a different pace: it was most intense in Egypt and Turkey in the second half of the 19th century, whereas in the countries of the Arabian Peninsula it only appeared on the agenda in the 20th century. At various stages of the colonial era, Islamic thinkers and political leaders played an essential role in Muslim politics. Their aim was to preserve authentic Islamic traditions and identity.

Muhammad Ali Pasha, governor of Egypt from 1805 to 1848, introduced agricultural, administrative, educational and military reforms. His initiatives gave rise to significant economic, intellectual, cultural and educational events in other Arab societies as well. In 1873 one of the wives of his grandson Ismail Pasha, who ruled Egypt from 1863 to 1879, opened the first public school for girls. The educator Rifa'a Rafi' al-Tahtawi (1801–1873) and the Minister of Education Ali Pasha Mubarak (1823–1893) published works in which they argued the need to educate women with argumentation from the Qur'an and the hadiths (Al-Tahtawi 1873; Mubarak 1868).

In the Ottoman Empire, the writer Namik Kemal (1840–1888) supported the idea of women's education, and the encyclopedist Semseddin Sami (1850–1904) published in 1880 a book entitled *Kadlinar*, in which he emphasized the importance of education for Muslim women and advocated for a reform of polygamy in Islam (Ahmed 1992: 138). Islamic reformer of Afghan origin Jamal al-Din al-Afgani (1838–1897) called for a major revision of the curriculum of Egypt's oldest Islamic university Al-Azhar. He suggested including philosophy and some other subjects in the curriculum with the aim of offering modern interpretations of Islam. At the same time these disciplines were to adhere to the religion. His ideas were similar to the ideology of Pan-Islamism⁵. Thus, the purpose was to promote religious institutional reforms aimed at raising a new generation of Muslims who would be aware of the social and political demands of modern times.

The most prominent followers of al-Afgani's ideas were the Egyptian religious figure Muhammad Abduh (1849–1905) and the Syrian religious reformer Rashid Rida (1865–1935). According to them, Muslims must return to the "true" Islam, both rational and divinely inspired, practiced by the ancient caliphs, cleansed of incorrect interpretations. Only in this manner would it be possible to enable the Muslim world to confront colonialism. Religion, philosophy and science need to be reconciled to renew Muslim societies and culture.

⁵ As an ideological movement, Pan-Islamism was promoted in the second half of the 19th century by Muslim intellectuals and politicians with anti-colonial and anti-imperialist sentiments who advocated a unified Muslim community of Shiite and Sunnis (Bowering 2013: 407–408).

Both reformers emphasize the value of new and progressive education, the need to grant equal rights to every human being, the abolition of racial discrimination, and above all, they condemn polygamy in Islam as social and moral abuse.

The encounter of a large part of the Muslim world with modernity coincided with the economic and political project of Western colonialism. The emancipation of Muslim women became a major moral argument in support of colonialism. Perhaps no field is more indicative of the modernization of the Muslim world than the struggle to redefine gender relations. But no matter how many countries adopted Western political, economic, social and legal institutions, in the beginning family law remained unchanged. It was subsequently reformed, but not replaced. The failure to replace family law with Western codes is a tacit acknowledgement of the importance and the sensitivity of women's issues in Islamic history and traditions (Esposito, Haddad 1998: XIV).

An increasing number of questions arose about the gender segregation resulting from the full veiling and confinement of Muslim women to the private sphere. Ensuring access to better education for more women became more and more urgent because they are the primary educators of children who must grow up in a beneficial environment that responds to the ongoing changes and trends for social progress worldwide. The Egyptian jurist and representative of the secular elite Qasim Amin (1863–1908) became the exponent of these new ideas. He published two extremely important works in defence of the emancipation of women in Egypt (Amin 2000). In the first of these, *The Liberation of Women* (1899), he argued that the emancipation of women from male domination was an essential prerequisite for the liberation of Egyptian society from Western supremacy and used Islamic arguments to call for an improvement of women's status. He appealed for the increase of the level of women's education and for their inclusion in social activities, so they could contribute to the public welfare and the general intellectual productivity of Egypt (Amin 2000: 13). According to Amin, Egyptian women were left far behind because they were deprived of the legal rights granted to them by Islam. He was convinced that in order to modernize the nation, women must regain these rights. He was also opposed to Muslim women covering their entire body when outside.

Promoting the debate about the status of women in Islam and their veiling drew sharp criticism from many religious leaders, journalists and public figures. Qasim Amin responded with another significant work, *The New Woman* (1901), in which he defended his position and developed his ideas, not relying on arguments based on the Qur'an and the words of the Prophet, but openly preaching the Western development model. Amin's writings are traditionally seen as marking the beginning of feminism in Arab culture. Although published more than a century ago, they continue to be debated in the Arab world and remain key to understanding the Arab feminist movement.

Birth of Islamic Feminism

Muslim women have long fought for empowerment, liberation, and justice through *taqwa*⁶. The debate about their social visibility seems to be relevant at any time and in any part of the world. The situation in the Middle East is no different. The term “Islamic feminism” was first used in the 1990s in Western literature on Muslim women, although the encounter of Islamic intellectuals with feminism, as we have seen, dates back to the mid-19th century. The topic has been of particular interest in academic circles over the past few decades.

Feminist discourse first appeared in Islam in the mid-19th century among the well-taught women of the upper and middle classes in Egypt, living mainly in urban harems. These Muslim women acquired new views on life due to the education they had received and their ever-increasing social contacts in the “women’s world”. Comparing their lives with those of women of other nationalities and religions, they realized that schooling would allow them to gain a deeper knowledge of their religion. Thus, they began to challenge the Islamic rationale for the seclusion and the covering of women’s bodies associated with male domination (Badran 2009: 19).

Today, some of the most relevant debates not only in modern Arab societies, but also around the world, once again revolve around gender inequality, the rights of Muslim women and, above all, their veiling. The Western view of Islam centres on the idea that Muslim societies are patriarchies. Historians like Leila Ahmed argue, however, that Islam did not invent this system, since patriarchy was a form of social organization already established in Mesopotamia, Persia, and Byzantium, with whose spheres of influence Muslims came into contact in the first century of Islam (Ahmed 1992: 9). The veiling of women and gender segregation were characteristic of the Sassanid community, the Christian areas in the Middle East, and the Mediterranean Basin at the time of the rise of Islam. The veiling of Muslim women began with the assimilation of the populations conquered by the Arabs after the establishment of Islam. The key discourses generated in the classical period of Islamic civilization (from the 7th century to mid-13th century) were set within this patriarchal frame.

Leila Ahmed distinguishes two types of Islamic feminism in Egypt at the beginning of the 20th century: modern feminism, which, in direct dialogue with the West, fights for the unveiling and the suffrage of Muslim women; and Islamic feminism, which opposes the “Westernization” and the unveiling of Muslim women (Ruby 2006). In her view, both types have influenced later forms of Islamic feminism seen in the West, in which many women veil and reject some of their “Western” privileges while proclaiming their Muslim rights instead.

Veiling is one of the main markers that lead many researchers to perceive Muslim women as oppressed members of the patriarchal society. The Islamic

⁶ The Arabic term *taqwa* denotes the Qur’anic concept of the moral framework of human actions, and the ethical consciousness related to God and society. It is used in the Qur’an to denote both piety and fear of God.

tradition regulates veiling, using mostly the term hijab from the Qur'an and the hadiths, which refers to both the covering of women's bodies with a piece of cloth and to the physical boundaries that separate men and women. Tabassum Ruby gives it a broader meaning: the hijab symbolizes the modest and decent behaviour of women, not just the veil that they put on in a certain way in Muslim countries (Ruby 2006: 54–66).

At the beginning of the 20th century, the women's magazines *Al-Afaf* and *Fatat al-Sharq* were launched in Egypt. In 1909, the women's charity organization *Muhammad Ali Benevolent Society* (Smith 2008: 148) was established in Cairo, its main goal being to give young mothers guidance on raising children. It was also one of the first non-governmental organizations founded in Egypt for religious and gender purposes. The emergence of local women's associations is one way Egyptians have counteracted foreign interferences in the provision of social services to women. Just over a decade later, in 1923, coming back from an international feminist meeting in Rome, two representatives of Egypt's female elite, Huda Shaarawi (1879–1947) and Saiza Nabarawi (1897–1985), removed their hijabs in front of a crowd of women who had gathered to greet them at the train station in Cairo. This act was the first social protest against veiling. It was then that The Egyptian Feminist Union (1923) was officially established. Huda Shaarawi, whose memoirs are among the main historical sources from which we draw information about this feminist movement (Shaarawi 1986), was chosen as the president of the Union. Other women's organizations emerged, such as the *Intellectual Association of Egyptian Women* (1914) and its successor the *Club of the Women's Union* (1925). Egyptian women were denied the right to vote until 1957, when Rawya Ateya (1926–1997) became the first female member of parliament in the Arab world. Other important events of this period were the establishment and spread of women's schools and mixed universities in almost every Muslim country; the creation of jobs for women in the public sphere; some reforms to the laws regarding Muslim women almost everywhere in the Islamic world.

The most radical reforms took place in 1920 in Turkey, where Kemal Atatürk, ignoring Islamic law, outlawed polygamy and gave significant rights to women. Under the influence of Western culture, in the mid-20s of the 20th century, the Shahanshah of Iran Reza Shah Pahlavi (1878–1944) made many changes and even banned the veil. This decision of his was supported by representatives of the upper class, both men and women. For most Iranians of that time, the veil was a symbol of backwardness compared to developed Western countries. The President of Tunisia Habib Bourguiba outlawed polygamy in 1956. Another Muslim-majority country that made reforms in favour of women in the middle of the 20th century was South Yemen, where polygamy was permitted in very few cases.

The reasons that led to reforms in most Muslim countries after the First World War, and even more so after the Second World War, stemmed from an ev-

er-widening cultural gap between the pro-Western elite and the majority of the population of the Arab countries. The ever-increasing Western economic, political and cultural influence and the rapid urbanization that occurred in some of these countries after the discovery of oil in their territories also had an impact.

Feminism is perceived as a direct threat to almost all traditional Islamic values and therefore does not enjoy much political support. It appears corrupt and suspicious in the eyes of fundamentalists, who accuse it of subverting local cultural traditions and serving colonial domination. This undoubtedly complicates the feminist struggle in Muslim societies. The resistance to feminism gives rise to the Arab narrative that opposes the colonial narrative: the veil, along with traditional female customs, becomes a means of resisting Western dominance. In recent years, some Islamic feminists have also spoken out, trying to reaffirm the authentic message of the Qur'an and restore the rights given to women by the earliest Muslim communities. They "often defied Western conceptions of feminist politics by contesting male-dominated interpretations of Islam and the subjugation of women while at the same time embracing gender divisions as natural and desirable" (Falah, Nagel 2005: 3).

Ideas of Islamic Feminism

The Moroccan sociologist Fatima Mernissi is one of the few Arab feminists who spent their life in the Muslim world. Her book *The veil and the male elite* is often cited as an example of Islamic feminist apologetics. In an attempt to show that Islam and women's rights are not incompatible, Mernissi suggests that the Prophet Muhammad may have been the first feminist. The men of that time were unwilling to give up the old customs of pre-Islamic society and adopt the more progressive attitudes towards women that Islam was trying to impose. According to Mernissi, there are more fraudulent than authentic traditions in Islam. Part of the negative interpretations of Islam are due to a wrong or inaccurate reading of some hadiths (Mernissi 1991: 3–9); this led the very first Muslim scholars to search for the fraudulent traditions. Another part is the result of a wrong exegesis proposed by later leaders of the ummah. Mernissi's theses have been criticized as logically and historically insufficient, as she avoids discussing the verses of the Qur'an that affirm gender inequality. However, the contribution of her books in gaining more rights for Muslim women worldwide is undeniable (Rhouni 2010).

Azza Karam understands feminism as an individual or collective awareness. She rejects its association with the colonial strategies in some Arab countries, the aim of which is to undermine local religious culture. The colonizers use the woman question to attack Islam and portray it as oppressive and retrograde: "Thus, in post-colonial Arab Muslim societies the term [feminism] is tainted, impure and heavily impregnated with stereotypes. Some of these stereotypes are that feminism basically stands for enmity between men and women, as well as a call for immorality in the form of sexual promiscuity for women" (Karam

1998: 5–6). These stereotypes persist over time and become an effective tool for discrediting anything that legitimises women's attempts to gain control over their own lives.

Karam distinguishes three main types of feminism in modern Egypt. The first is Islamic feminism, which strives for the recognition of women and equality between the sexes. Islamic feminists challenge the observance of traditional Islamic norms, according to which veiling is an undisputed religious obligation and, more importantly, a symbol of religious conviction and solidarity with other Muslims. The second type is Muslim feminism, which also refers to the Qur'an and the sunnah to show that the discourse on equality between men and women is valid within Islam. According to Muslim feminists, women's veiling should be based on their own choice and conviction. The third type is Secular feminism, which respects religion as a personal choice but completely rejects it as a basis for women's emancipation. In this way, secular feminists avoid endless debates about the position and status of women in religion (Karam 1998: 9–14).

Relying on the Egyptian experience, Margot Badran distinguishes two types of feminism, Secular and Islamic, which treat gender equality differently. She defines Secular feminism as seeking gender equality in the public sphere and aiming at women gaining more political rights and access to education and employment. Islamic feminism, for its part, has its own arguments that the patriarchal model of the family does not correspond to the Qur'anic principles of gender equality. Islamic feminists promote gender equality through the egalitarian model of both family and society. Thus, they do not conceptualize the public-private divide, characteristic of secular feminism. Moreover, they insist on gender equality in the religious domain of the public sphere, for example in the religious affairs and in the mosque rituals. The study of Secular and Islamic feminism side by side highlights the similarities, not just the differences, between their paradigms. Therefore, their representatives are working together more and more and collaborating in joint militant campaigns to achieve their common goals. Therefore, they should not be perceived as oppositional forces, as some are inclined to do (Badran 2009: 3–6).

Today, some feminists in the West do not believe that the primary sources of religion – the Qur'an, the hadiths, the sunnah, and even the Sharia – favour the system of male domination. They offer their own interpretations of the primary Islamic sources based on the authentic religious knowledge, which is equally valid for both men and women. Amina Wadud argues that each reading of the Qur'an updates its meaning (Wadud 2007: 189). Abdennur Prado sheds more light on what reading the Qur'an actually entails from a feminist perspective: "This is about living and updating the eternal message of the Qur'an, here and now, in our specific circumstances" (Prado 2012: 45). Prado understands feminist hermeneutics as a form of critical thinking aimed at a new objectivity, which refuses, however, to establish itself as an orthodoxy that can be imposed on believers. The reading of the Qur'an is offered to all Muslims as a potential

stimulus for its revelation here and now. It provides an opportunity for spiritual renewal of the mind if readers, on the one hand, overcome the prejudices that traditional Muslim societies have placed between themselves and the Qur'an, and on the other hand, disregard the biased attitude to gender that is absent from the text and leads to limiting the scope of the Qur'an. In her essay "Globalizing Equality: Muslim Women, Theology and Feminism" Asma Barlas encourages readers to see the dynamics within individual communities around the world, and especially in Islamic ones (Barlas 2005: 168–189). She calls for the initiation of a dialogue on the role of women in Islam and the improvement of their situation. She suggests that reading the Qur'an, removing its patriarchal interpretations, and discovering references to gender equality in the holy text would help Muslim women to understand religious texts.

Variations of feminism in an Islamic context have given rise to different responses from Muslims and non-Muslims worldwide. It is not about an equivalent definition or classification of feminism in Islam, but about different actions for the emancipation of Muslim women that can be identified as Islamic, Muslim or Secular feminism. All of them seek to ensure more rights for Muslim women in the private and public spheres, and social justice. But even more important is the achievement of actual gender equality and the conquest of freedom of expression and movement for Muslim women (Zilka 2012: 79).

Conclusion

Nowadays, neither Islam nor Muslim women can be understood as homogeneous categories. This study has shown that debates concerning Muslim women's rights cannot be reduced to a simple opposition between Islam and feminism or between tradition and modernity. Rather, they reflect ongoing processes of interpretation and negotiation in which religious principles, legal norms, and social realities interact in diverse ways across Muslim societies. Within this plural framework, Islamic feminism represents one of several approaches that seek to reconcile religious commitment with claims for gender equality and greater participation in public life.

The analysis has highlighted the central role of women's education in these processes. Within Islamic thought, the pursuit of knowledge has traditionally been regarded as a religious obligation for both women and men. Expanded access to education, together with the opportunities created by digital technologies, has enabled many Muslim women to participate more actively in religious, social, and professional life, while developing new forms of engagement with Islamic traditions. These developments illustrate how religious commitment and social participation are not necessarily mutually exclusive, but may evolve through continuous reinterpretation and adaptation.

In recent years, migration and the growing presence of Muslim communities in Europe further underline the importance of examining these issues within their specific historical, social, and political contexts. The experiences

of Muslim women are shaped not only by religious beliefs and legal norms but also by integration processes, educational opportunities, socio-economic conditions, and the institutional frameworks of the societies in which they live. Consequently, debates on Muslim women's rights cannot be detached from the broader questions of citizenship, integration, religious freedom, and cultural diversity that characterize contemporary European societies. This issue remains unresolved and continues to generate debate within the European Union⁷.

In this regard, the faith professed by so-called minorities and the life they lead should not constitute an obstacle to their integration within the social order. On the contrary, individuals ought to be recognized as free to express and practice their convictions, within the framework of the law. From this perspective, policies of social and institutional tolerance appear essential in contexts, characterized by ethnic, cultural, and religious pluralism, where coexistence requires the accommodation of difference rather than its suppression.

Ultimately, this approach demonstrates that Muslim women's experiences can only be fully understood through a contextualized framework that acknowledges the plurality of Islamic legal traditions, historical trajectories, and socio-political contexts. By moving beyond essentialist representations, it provides a more nuanced understanding of the complex relationships between religion, gender, law, and social change, while also supporting policies of tolerance and integration within plural societies.

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⁷ For example, the “battle of the veil” in France.

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Ethnic Media at the Crossroads of Identity: Minority Education in the Discourses of *Agos*¹

Abstract: In the context of globalisation, media function not merely as channels of information transmission but as key social institutions actively involved in the formation and reproduction of social relations, public discourses and questions of identity. Within this framework, ethnic media play a particularly significant role in multicultural societies, serving as mediating platforms between minority and majority populations and providing opportunities for identity preservation, public visibility, political and cultural involvement. At the same time, their activities are shaped by the political and social structures of the host country, which may simultaneously enable and constrain the scope of ethnic media influence. The study aims to analyse public discourses in ethnic media concerning identity issues via education, language, and community institutions as it is represented in the pages of the bilingual Armenian weekly *Agos*, published in Istanbul, Turkey. According to that, the school is framed not merely as an educational institution but as a distinct arena for the preservation and reproduction of cultural and linguistic identity.

The analysis demonstrates that ethnic press functions not only as a medium of intra-communal communication but also as a media-discursive mechanism in which the interrelation between school, language and identity emerges as one of the fundamental issues of community life.

Keywords: *Ethnic media; Minority press; Cultural identity; Language and Education; Community institutions; Multiculturalism; Public discourse; Armenian community in Turkey; Agos newspaper*

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Introduction: Key Concepts and Terminology

In the context of global communication, the role of ethnic media has significantly increased over recent decades, driven by the intensification of migration processes, the digitalisation of media environments, and the emergence of new patterns of media consumption. This field has undergone notable structural and substantive transformations, including the incorporation of social media platforms, the development of new journalistic practices, and the reconfiguration of modes of audience engagement.

Contemporary scholarship emphasises that ethnic media do not merely transmit information; rather, they function as vital platforms for the preservation and transformation of communal identity, the continuity of cultural traditions, and the public representation of minority communities (Georgiou 2006; Karim 2003). Particular attention is devoted to the linguistic functions of ethnic media, especially the role of bilingualism. On the one hand, bilingual media expand the possibilities of public outreach and enable engagement with broader audiences; on the other hand, they may generate risks of identity or cultural dilution (Muñoz, Retis 2023; Yu, Atrchian 2024).

Contemporary scholarship on ethnic media also examines how media shape the representation of ethnic minorities, influence societal perceptions, and contribute to the reconfiguration of cultural and social boundaries within multicultural environments (Cottle 2000). A number of studies demonstrate that media actively shape political, cultural, and social relations, while fostering the formation of group identity, communal bonds, and civic engagement across diverse societal and transnational contexts (Fraser 1990; Yu 2018).

In the scholarly literature, there is as yet no universally accepted approach to the terminology and definitions of ethnic media. The same phenomenon is described in different studies through a variety of concepts, including “ethnic media,” “minority media,” “immigrant media,” “diaspora media,” and “community media,” among others. This terminological diversity reflects the ways in which different national contexts and academic traditions define and conceptualise ethnic, cultural, or racial differences (Matsaganis, Katz, Ball-Rokeach 2011: 8–10). Despite terminological differences, these concepts largely converge around a common feature: a media platform oriented towards a specific ethnic or cultural group.

In the present article, the term “ethnic media” is preferred, as it represents a broader and analytically more flexible concept. It encompasses media platforms that are created by and/or operate for immigrant communities, ethnic, racial, and linguistic minorities, as well as indigenous groups residing in different parts of the world (Matsaganis, Katz, Ball-Rokeach 2011: 10). Ethnic media may encompass a wide range of platforms—newspapers, websites, social media etc.—but analytical attention may be directed toward their core functions: the identity issues, the maintenance of linguistic and cultural continuity of the certain ethnic group, and the promotion of public participation (Yu 2015: 133–134).

And although multilingual ethnic media may carry certain risks, some scholars argue that bilingual media may not weaken but rather reinforce ethnic identity by fostering transnational connections and sustaining cultural resilience (Georgiou 2006; Yu 2018).

One of the key strengths of ethnic media lies in their ability to communicate with audiences through culturally and linguistically proximate forms, facilitating deeper comprehension of content, enhancing cultural recognition, and strengthening social bonds within the community. At the same time, the bilingual or multilingual nature of such media generates structural and substantive tensions, as it requires the continuous negotiation between preserving communal identity and participating in a broader public discourse. The diversity of concepts and theoretical approaches reflects the complex and multilayered relationship between media and identity, necessitating sustained scholarly inquiry that takes into account regional, cultural, and socio-political specificities.

These theoretical perspectives may be productively applied to the discursive analysis of *Agos*—the Armenian bilingual weekly newspaper publishing in Istanbul. The newspaper functions as a platform for critical public speech and alternative discourse, in which education, language and identity issues are interlinked, thereby contributing to the community's continuity and the preservation of its cultural identity.

In this context, *Agos* constructs a media-discursive space in which education and language become one of the central issues of community survival strategies. The study thus contributes to the broader discussions on ethnic media, minority education, and the approaches on cultural continuity in contemporary multicultural societies.

Methods and Methodology of the Research

The research proposes several approaches to the study of ethnic media and identity issues. It offers the systematic analysis of the educational and linguistic discourses of the Armenian ethnic press in Turkey, especially focusing on the weekly newspaper *Agos*. In this framework, the school is conceptualised not merely as an educational institution, but as a key discursive space for the formation and reproduction of communal identity. And, the study combines media-discursive analysis of *Agos* with empirical data derived from fieldwork conducted in Istanbul in 2026 by the researchers of the Department of Diaspora Studies of the Institute of Archaeology and Ethnography of the National Academy of Sciences of the Republic of Armenia, thereby enabling a linkage between media discourse and the lived experiences and perceptions within the community.

The empirical material was collected through purposive and snowball sampling. This approach made it possible to recruit participants with direct knowledge of the research topic while also identifying additional relevant respondents within the Istanbul Armenian community. The study drew on expert

and in-depth interviews conducted in Western Armenian with the members of *Agos* editorial staff, representatives of Aras Publishing House and the Yesayan Association of Literature and Culture, the members of the community. The sampling strategy emphasized institutional diversity in order to capture varying perspectives on identity issues, education, the use of language and media. The interviews focused on language practices, perceptions of education, and the role of ethnic media in identity formation.

The study combined fieldwork with media and discourse analysis. Materials published in *Agos* between 1996 and 2026 were examined to identify editorial positions, language practices, and thematic priorities. The newspaper's website and social media platforms were also analysed in order to assess its digital presence, modes of self-representation, and communication strategies. In addition, the research drew on secondary academic literature, Turkish-language scholarly and journalistic sources, and the memoirs and publications of Hrant Dink to situate *Agos* within its broader social, political, and historical context. The discourse analysis was based on thematic coding, with particular attention to recurring themes such as education, language, identity, and institutions, as well as to framing strategies, lexical choices, and narrative positioning.

This methodology makes it possible to analyse not only of media content but also of the broader role of *Agos* in shaping identity, language practices, cultural continuity, and intercommunal interaction.

On the Founding of *Agos*

Agos (Turkish: *Agos*) was established in Istanbul in 1996 as the first bilingual Armenian weekly newspaper published in Turkey during the Republican era. Established under the leadership of its founding editor Hrant Dink and a group of Armenian intellectuals, the newspaper emerged in response to the limited public visibility of the Armenian community in Turkey and the absence of an open platform for articulating its social, cultural, and political concerns.

The title *Agos*, meaning “furrow” in Armenian, symbolically refers to the act of opening a new path or initiating dialogue—an idea that became central to the newspaper's editorial mission² (AGOS'tan merhaba 1996: 1).

The founders aimed to establish a weekly bilingual newspaper that would be democratic and open-minded, impartial yet outspoken, peace-oriented and constructive, principled and reasonable, both national and international in scope. They envisioned a publication that would be bold in its reporting, measured in its commentary, inclusive of all segments of the community, capable of making the community's voice heard, and characterized by a spirit that was optimistic, youthful, timely, contemporary, and innovative (Inchu *Agos* 1996: 5).

² The term *Agos* is used in both languages to denote the furrow opened in the soil by a plough as a source of fertility, into which seeds are sown. Its Turkish equivalents are *arık*, *ark*, or *hark*.

From its inception, *Agos* sought to create a public space in which issues affecting the Armenian community could be discussed openly, while also addressing broader questions concerning democracy, minority rights, historical memory and coexistence. By publishing in both Armenian and Turkish, *Agos* aimed not only to serve the internal communicative needs of the Armenian community but also to reach the wider Turkish-speaking public, thereby fostering dialogue between minority and majority audiences. The Armenian-language section was particularly oriented toward younger readers, providing them with opportunities to engage with national and traditional values, literature, art, culture. At the same time, this orientation did not imply that the Turkish-language pages should function as a barrier for youth, distancing them from the study and use of the Armenian language (Mashoyan 1996: 6).

Over time, the newspaper became a significant platform for critical public discourse and played an important role in reshaping conversations about identity, historical memory, and minority rights in Turkey.

The newspaper's editor-in-chief was the Turkish-Armenian journalist and intellectual Hrant Dink until his death in 2007. Hrant Dink was assassinated on 19 January, 2007, after being shot three times in the back of the head in front of the newspaper's editorial office.

The assassination of Hrant Dink on 19 January 2007 marked a decisive turning point not only in the history of *Agos*, but also in the broader public discourse on minority rights, freedom of expression, and Armenian identity in Turkey. The unprecedented public mobilization that followed, expressed through the slogans "We all are Hrants" and "We are all Armenians" ("Hepimiz Hrant'ız, hepimiz Ermeni'yiz") (Koptaş 2007: 2–3), signaled a rare moment of solidarity between minority and majority publics. In this context, *Agos* was transformed from a community-based newspaper into a symbol of critical journalism, democratic struggle, and intercommunal dialogue. Dink's writings reached a new generation and made the Armenian community more visible to wider society, turning communal issues into matters of public concern. His assassination intensified awareness of Armenian identity, particularly among younger people, while also prompting broader reflection within Turkish society on the reasons and implications of his murder.

Dink's death broke a long-standing silence, encouraging Armenians, Turks, Alevis, and Kurds alike to speak more openly about their pasts, identities, and origins (Expert interview 6, 2026).

Since January 2015, the editor-in-chief of *Agos* has been Yetvart Danzikyan, while the editor of the Armenian-language section is Pakrat Estukyan. At present, the weekly is published in a 16-page format, with 12 pages in Turkish and 4 pages in Western Armenian. The editorial office is located in Istanbul. The current print circulation amounts to approximately 2000 copies per week (Expert interview 1, 2026). The newspaper's official website is actively maintained, providing content in Western Armenian, Eastern Armenian, Turkish

and English. The readership of the website exceeds that of the print edition, which tends to be more condensed due to limitations in print page space.³

The materials published in the newspaper address issues related to the community life of the Armenians of Turkey, the Republic of Armenia, the Armenian Diaspora and other relevant topics. In addition, the newspaper regularly features current events and topical developments taking place in Turkey and worldwide.

The newspaper has articulated positions that have not always coincided with dominant perceptions within the community and the broader diaspora. It has emphasised that the use of Turkish may facilitate the integration of the community, particularly given that many members do not possess sufficient proficiency in Armenian, while the rejection of Turkish can lead to social isolation from the majority population. At the same time, it has been underscored that self-isolation cannot ensure the preservation of communal identity, and that under conditions of globalisation younger generations are subject to processes of gradual assimilation. Consequently, engagement with the broader social environment is presented as both necessary and inevitable (Baskın 2006: 134).

The newspaper *Agos* functions within the Turkish-Armenian community not merely as a source of information, but as a social and cultural institution that performs several key functions simultaneously. It shapes the public representation of ethnic identity by mediating between the community and the broader Turkish society, while also creating a platform for alternative public discourse. The newspaper contributes to the preservation and reproduction of collective historical memory—particularly in relation to historical silences and painful pasts—while providing a space for intra-communal debate and self-reflection (Expert interview 5, 2026).

The headlines and editorial positions of *Agos* generate varying degrees of resonance both within the Armenian community and in the wider public sphere. As Hrant Dink once remarked, “Even if only one person reads it—if I can reach that one person—that is important to me” (İnandığı dili bırakmadı, toprağını terk etmedi 2026: 3).

This perspective indicates that the significance of the newspaper lies not solely in its mass influence, but also at the individual level, where a message conveyed to each reader may hold vital importance for the consolidation and reinforcement of communal identity and ethnic minority issues.

Education, Language, Community Institutions and the Identity Issues in the Discourses of *Agos*

From the very first years following the establishment of *Agos*, Hrant Dink, the establisher of the newspaper, identified a range of spheres in which the needs

³ Agos. 2026. *Agos Official Website*. [online] Available at: <https://www.agos.com.tr/en> [Accessed 11 February 2026].

for reforms were evident—from schools to foundations, from civic associations to religious structures. He sought to address all segments of the Armenian community, regardless of age or social position, and devoted particular attention to the complex and troubling conditions prevailing within the educational system. Dink emphasised that the capacity to adapt rapidly to Western values plays a crucial role in the transformation of identity within Armenian communities (Dink 2003: 10). He further observed that during the recent years Armenian schools have lost more than half of their student population, as many families prefer to enroll their children in foreign colleges and private institutions, given that graduation from Armenian schools often creates additional challenges in accessing university education (Çandar 2010: 386).

On *Agos* pages, Dink also criticised the internal structures of the Armenian community. He argued that the community had failed to establish effective secular non-governmental organisations capable of complementing or replacing traditional institutional frameworks and contributing to communal consolidation. According to Dink, while the individual identities of members of the Armenian community in Turkey may be strengthening, communal institutions themselves are experiencing a state of crisis. In his view, the only viable path out of this crisis lies in subjecting these institutions to processes of secularisation and greater transparency (Dink 2005: 10).

Dink emphasised that both the world and Turkey are undergoing the processes of restructuring, and that the community cannot sustain itself indefinitely through conservative approaches and modes of governance grounded in individual interests. He argued that the community must place secularisation and transparency at the core of its institutional system in order to secure the future of its younger generations and to implement a sustainable strategy for identity preservation—rather than relying on the romanticisation of past traditions and historical narratives (Çandar 2010: 387). These issues suggest that identity cannot be preserved through the mere repetition of tradition. For Dink, educational quality, the living transmission of language, and the secular, transparent reform of communal institutions were central to the community's survival. His critique was future-oriented, warning that without institutional and intellectual renewal, attempts at identity preservation would ultimately lead to gradual erosion.

Armenian schools are examined here not as autonomous educational institutions, but as mediated representations within *Agos*, where they emerge as key symbolic and discursive sites for negotiating identity, preserving language, and sustaining communal continuity. In the newspaper's discourse, schools are presented not merely as administrative or pedagogical structures, but as one of the central spaces for the reproduction of collective memory and cultural survival. By repeatedly addressing issues such as declining enrolment, bilingual education, and curricular constraints, *Agos* portrays the school system simultaneously as a vulnerable institution and as a strategic arena of resistance.

Nowadays, the Armenian school in Istanbul⁴ has once again emerged as a priority issue on the communal agenda, marked by its concerns and challenges. The matter extends beyond educational difficulties alone, encompassing an entire institutional system that is intrinsically linked to language, identity, collective memory, and visions of the future. For a long time, the Armenian school in Turkey has been perceived not merely as a site of knowledge transmission, but as a foundational pillar of communal existence, where cultural identity has been formed and reproduced. Over time, however, the school has encountered a range of new challenges. Restrictions imposed by state educational policies, demographic transformations, emigration, and economic difficulties within the community have all exerted significant pressure on educational institutions. Under such conditions, schools are often compelled to operate in a mode of institutional survival, making compromises in relation to their curricular content and linguistic mission (Esdughean 2018: 1).

The education system is structured as a three-tier model comprising pre-school, primary, and upper secondary (lyceum) education (Expert interview 1, 2026). At the primary level, Armenian and Turkish are each taught for at least eight hours per week, yet instruction overall is dominated by Turkish and English. Within the twelve-year school system, Armenian tends to occupy a lower academic priority, as parents often focus more on subjects included in the national examination framework (In-depth interview 4, 2026). Recent years have seen modest but important institutional change: Armenian-language textbook publishing, especially in children's literature, has expanded, while most other subjects continue to rely on textbooks based on the Turkish state curriculum. At

⁴ At the present time there are 16 Armenian schools operate in Istanbul, functioning within the curricular framework established by the Ministry of National Education of Turkey. They are: Getronagan Armenian High School, Esayan Armenian School (Esayan İÖO & High School), Pangaltı Mkhitarian School (Pangaltı Armenian School), Surp Haç Tıbrevank (Holy Cross Tıbrevank) High School, Kalfayan Primary School (Kalfayan İÖO), Feriköy Merametçyan, Kocamustafapaşa Anarad Hıgutyun Primary School, Aramyan Uncuyan Primary School, Bezciyan Primary School, Dadyan Primary School, Karaközyan Primary School, Levon Vartuhyan Primary School, Sahakyan Nunyan Primary & High School, Tarkmançats Primary School, Yeşilköy Primary School, Bomonti Mkhitarian Primary School — Armenian primary school (note: operations have paused due to building works). Hrant Dink School (Istanbul)—Armenian school for children from Armenia (moved classes and operates with Armenian curriculum). The Hrant Dink School is a distinctive Armenian educational institution in Istanbul. It operates in the Gedikpaşa district, within the building of the Armenian Evangelical Church of Istanbul. The school was founded in 2003 and has borne the name of Hrant Dink since 2010. Among its principal characteristics is the implementation of the curriculum adopted in the Republic of Armenia, with instruction conducted almost entirely in Armenian (Eastern Armenian). A significant proportion of its students come from families who have relocated to Istanbul from Armenia for employment. This school does not issue a Turkish state-recognised diploma; however, its graduation certificate is recognised in Armenia. In the current academic year, the school enrolls 50 students. The teaching staff consists of 17 educators from Armenia, along with four Istanbul-Armenian teachers responsible for physical education, music, visual arts and religious studies (Hayastanyan, Hrant Dink Dprotsi Siro Seghane Ays Kiraki 2026: 4).

the same time, greater flexibility in textbook selection and the removal of earlier supervisory requirements have strengthened community control over schooling, with administrative leadership now largely held by Armenians (Expert interview 2, 2026).

Nowadays *Agos* emphasises that in the context of language Armenian is presented in schools not merely as a tool of communication, but as a central component of identity preservation, the transmission of communal historical memory, and cultural continuity. The decline of the language is framed not simply as an educational or technical issue, but as a profound social process directly related to the reproduction of communal identity and the prospects for the community's future existence.

Nowadays, for many individuals Armenian has become a "foreign language to be learned," rather than a natural medium of everyday communication. Within the school environment, Armenian instruction is often confined to the classroom setting, and children tend to perceive it as just another academic subject, without practical application in daily life. As a result, the teaching of Armenian risks being reduced to a textbook-based routine, thereby undermining the vitality of the language (Estukyan 2016). It is important to emphasise that the survival of a language no longer depends solely on its use in natural communication, but is increasingly contingent upon the educational system and the broader communal environment. The perception of Western Armenian as a language that is primarily taught, rather than lived, is partly shaped by the geographical and cultural context of Turkey. For example, children rarely use Armenian outside the school setting, with the result that the language gradually loses its natural, social, and cultural functions (Estukyan 2016).

Moreover, the minority education is no longer perceived in the same manner as in the past. Whereas the school was once regarded as a formative space for the construction of identity, it is now frequently viewed as a compulsory stage primarily oriented toward social mobility or professional advancement. This shift is particularly problematic for minority communities, for whom the school often constitutes the only organised environment in which the mother tongue and cultural heritage can be transmitted to subsequent generations (Es-dughean 2018: 1).

The bilingual character of the Armenian schools represents both an opportunity and a challenge. On the one hand, it enables communication with the majority population and facilitates integration into broader social life; on the other hand, it entails a persistent risk that the mother tongue may be relegated to a secondary position. The weakening of the language within the school environment inevitably affects identity, as language is not merely a means of communication, but also a carrier of modes of thought, values, and historical memory. In this context, the school cannot be considered in isolation. It is intrinsically connected to the overall condition of the community, the broader political environment, and prevailing public discourses. If the community lacks a clear vision

of its educational priorities, the school risks becoming a formal structure devoid of its substantive significance. The future of the Armenian school depends not only on state policies and decisions, but also on the level of awareness, cohesion, and responsibility within the community itself (Esdughean 2018: 1).

So, today the Armenian schools in Istanbul function as a strategic platform in which education, language, and cultural identity converge to ensure communal continuity. Its mission demonstrates that education is not merely a technical process, but a central instrument for the preservation of identity, memory, and cultural continuity.

Armenian schools in Istanbul continue to face a steady decline in enrolment, affecting both overall student numbers and new admissions. Total enrolment fell from 3,016 in 2021–2022 to 2,686 in 2025–2026, while new admissions dropped from 480–478 in 2022–2024 to 421 in 2025–2026. This trend points to a sustained contraction of the school population and raises concerns about the long-term institutional viability of Armenian education in Istanbul (Erdoğan 2025).

Many parents choose to enroll their children in non-Armenian schools, justifying this decision by referring to higher educational standards; however, this interpretation is only partially accurate. While the quality of education in certain foreign or private schools may indeed be higher, the participation of Armenian students remains limited due to the highly competitive and demanding examination system. Another frequently cited reason is that some parents wish to ensure their children achieve full proficiency in Turkish; yet in the context of Istanbul, children naturally acquire Turkish and communicate through it in their everyday environment (Expert interview 5, 2026). Despite these constraints, most Armenian families continue to choose Armenian schools, largely for economic and communal reasons. Given the high cost of private education, Armenian schools remain the more accessible option, even for some affluent families, although this preference is not always fully reflected in statistical data (In-depth interview 4, 2026). The decline in student numbers is most pronounced in grades 8–12. At the same time, the arrival of students from the provinces to Istanbul provides limited but important demographic support for the system (Expert interview 2, 2026). Nevertheless, the downward trend in enrolment in Armenian schools in Istanbul should not be viewed merely as a reflection of demographic processes; it may also be interpreted as a possible indicator of changing effectiveness within the institutional systems responsible for the community's cultural and linguistic reproduction.

The financing of the schools is primarily secured through community foundations (*vakıfs*),⁵ while additional resources are supplemented by donations. This model enables the maintenance of educational institutions and often en-

⁵ The word “*vakıf*” is the Turkish transliteration of the original Arabic word “*waqf*” that usually means “foundation”. *Vakıf* is a system of financing and producing charitable services. At present, *vakıfs* play a significant role in the preservation of minority identity, the functioning of

sures more affordable tuition in comparison with other Turkish schools. In cases where only symbolic fees are required, students are able to attend even if their families face financial hardship (Expert interview 2, 2026).

Another important factor concerns the level of teacher training and professional preparedness. Adequate financial resources make it possible to provide competitive salaries, thereby attracting qualified teachers and improving the overall quality of instruction. Conversely, when funding is limited or when teachers' salaries are financed directly by parental contributions, families may opt to send their children to other schools, further contributing to student outflow and declining enrollment (Expert interview 3, 2026). Beyond financial considerations, it is also essential to recognise the broader social and communal role of teachers. In Armenian schools, educators are not confined solely to the transmission of knowledge. Schools organise commemorative and appreciation events on the occasion of Teachers' Day, and particular value is placed on those with extensive professional experience. A number of teachers have maintained the tradition of instructing in Armenian, despite the preferences of some parents for classes to be conducted in Turkish. Such dedication is crucial for sustaining the vitality of the language and transmitting cultural identity, as the teacher assumes a central role in the preservation of communal identity (Esdughean 2025: 7).

Over the past decade, the decline in student enrolment in Armenian schools in Istanbul may be grouped into several principal factors. First, intermarriage has had a measurable impact: some families choose to place their children in alternative educational environments, thereby reducing enrollment in Armenian schools. Second, demographic trends—particularly the decision of some families not to have children or to limit family size—have contributed to a natural decrease in the student population. Third, emigration, especially among younger generations. Many young people leave for educational, professional, or political reasons and perceive limited future prospects within the local economic context, characterised by low wages and difficulties in securing stable employment (In-depth interview 4, 2026).

By the way, the comprehensive statistical and sociological studies in this field remain limited; nevertheless, the decrease in student numbers indicates that the community is facing a significant challenge with regard to the continuity and sustainability of its educational institutions and traditions.

Today the ongoing discussions surrounding Armenian schools indicate that the issue extends beyond the selection of an educational model; it represents a strategic question concerning communal identity and continuity. Proposals advanced within the framework of ERVAB (*Ermeni Vakıflar Birliği*, the Union of Armenian Foundations) regarding the optimisation of vocational

educational institutions, and the reproduction of cultural heritage, serving as distinctive mediating platforms within state–community relations.

institutions, kindergartens, and schools reflect broader demographic decline and socio-economic transformations within the community. In this context, kindergartens are viewed not merely as an initial stage of formal education, but as a foundational site for the reproduction of identity, given that linguistic and cultural belonging are formed at an early age (Okullarımızın geleceği: Üç güçlü lise planlanabilir: 2025).

At the same time, it is evident that the issue of secondary education cannot be regarded as secondary in importance. The establishment of strong secondary schools based on differentiated models may help prevent the outflow of high-performing students and restore the competitiveness of Armenian educational institutions. The proposed model of three strong lyceums seeks to combine academic excellence, alignment with international educational standards, and social inclusivity.

The overarching objective remains clear: no Armenian school should be closed. To achieve this, it is necessary to reengage families who currently do not choose Armenian schools, preserve the existing institutional framework, and adapt to changing conditions in order to secure the community's future (Okullarımızın geleceği: Üç güçlü lise planlanabilir: 2025).

Within this discursive construction, the Armenian school emerges as a site of identity production, where language is not only taught but also symbolically contested. In this way, *Agos* transforms educational institutions into narrative instruments through which broader anxieties surrounding cultural survival are articulated and made public.

The discussions demonstrate that the future of the Armenian educational system in Istanbul depends not on reducing the number of schools, but on their substantive transformation and alignment with the community's actual needs. The primary objectives of educational policy should therefore extend beyond ensuring the quality of instruction to safeguarding the continuity of Armenian schools as key institutions for the preservation of communal identity and historical memory.

Conclusion

The analysis demonstrates that within the discursive framework of *Agos*, the Armenian school in Istanbul is constructed as a strategic space in which education, language, and communal identity intersect. The educational crisis addressed is not framed merely as a matter of pedagogical quality or institutional management, but as a structural challenge to the mechanisms through which communal identity is reproduced. In this sense, the school can emerge as a central arena of identity politics, where questions of linguistic vitality, cultural continuity, and collective memory are negotiated in relation to broader socio-political transformations in Turkey.

The study further confirms that *Agos* operates not only as an informational outlet, but as a critical media platform that mediates between the Armenian

community and the wider public sphere. By foregrounding debates on education, language policy and communal institutions, the newspaper constructs a media discursive space in which fundamental issues of communal survival are articulated and contested. The interrelation of school–language–identity becomes a key analytical axis through which the tensions between integration and preservation, bilingualism and linguistic erosion, institutional reform and traditional structures are explored.

The findings contribute to scholarship on ethnic media by illustrating how, under conditions of globalisation and demographic change, ethnic press redefines its role. Rather than functioning solely as a vehicle of cultural preservation, it becomes an active agent in shaping public discourse, fostering intra- and intercommunal dialogue, and redefining the boundaries of belonging. In the case of *Agos*, the discourse on education and language reveals the extent to which the future of the Armenian community in Istanbul is perceived as contingent upon the transformation—rather than mere maintenance—of its institutional and cultural foundations.

Accordingly, the Armenian school, as represented in media sources, is not treated as a marginal educational concern, but as a central mechanism of communal continuity. Its crisis is discursively linked to the potential erosion of identity, while its reform is framed as a strategic imperative for sustaining linguistic vitality, collective memory and long-term community resilience.

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Religiosity in the 21st Century— Alternative Spiritual Teaching and Its Bulgarian Followers

Abstract: The radical transformations in Bulgarian society following 1989, together with the subsequent disillusionments, economic instability, and rising levels of poverty, have frequently prompted people to seek explanations and solutions beyond purely rational and pragmatic frameworks. In response to these conditions, many people turn to religious practices as a means of coping with critical life situations in their everyday lives. Alongside traditional religions, Christian denominations, and sects, Bulgaria has also witnessed the introduction and diffusion of new religious movements and forms of spirituality, often categorized as alternative. A prominent mechanism for the dissemination of these movements has been the increasing provision of organized, paid group courses, seminars, and workshops. Through this process, spiritual practices are effectively economized. The text presents an ethnological study of a group of Bulgarian followers of a novel religious teaching that has been spreading in the country since the early 2010s. The respondents engage with a microenterprise established in 2011, which organizes and facilitates participation in high-cost seminars on the so-called Tibetan System for Healing and Self-Development, integrating spiritual and physical practices of Eastern origin. This enterprise was founded as an intermediary for a spiritual school originally established in Moscow in 1995. The focus of the study encompasses the practices and activities offered during the seminars and master classes, which are conducted both in Sofia and in selected Bulgarian mountain and Black Sea resort locations.

This study is concerned with understanding the motivations and purposes underlying the engagement of Bulgarians of diverse ages and social backgrounds with this particular teaching, as well as their attitudes and expectations toward encounters with alternative knowledge and practices. The analysis will focus on the defining characteristics of the emerging new spirituality among the respondents and the processes through which they construct a collective identity as members of the nascent religious community. The study will address the question in what manner contemporary business interests find a place in the construction of alternative spirituality and will contribute to understanding the process of commodification of the new spirituality.

Keywords: *alternative spirituality, holistic medicine, new religious teaching in Bulgaria, self-development practices, commodification of spirituality*

Introduction

In recent decades, new religious phenomena and ideas have proliferated in postmodern societies, gaining traction under designations such as New Age religiosity, modern esotericism, and new, holistic, or alternative spirituality (Höllinger 2022). Across diverse forms of spiritual teachings and practices, individuals frequently seek answers to existential questions, including those concerning the meaning of life, the nature of fate and personal responsibility, and the boundaries, possibilities, and freedoms inherent in human choice (Manova 2022a: 35–36). Esoteric and spiritual practices have witnessed growing popularity within postmodern social contexts, in which individual prosperity and personal self-realization are highly valorized. These practices often function as avenues for addressing the spiritual needs of those who experience dissatisfaction with the hyper-rational and pragmatic orientation characteristic of contemporary social life.

The rise of religiosity has also been observed in post-socialist societies of Eastern Europe since the 1990s and is recognized as one of the significant consequences of the collapse of state socialism. This phenomenon has stimulated increased scholarly attention across multiple social science disciplines (e.g., Pickel, Sammet 2012; Cotofana, Nyce 2017; Benovska 2020). A similar trend has been observed in Bulgaria, where it has become a focal point for research within the humanities. Milena Benovska observes that, following the political and economic transformations of the final decade of the twentieth century, Bulgarians began to freely pursue their spiritual needs, manifesting in a steadily increasing interest in religious ideas and practices, in various denominations, emerging sectarian movements, and even in paranormal phenomena (Benovska-Sabkova 1991; 1993).

The radical societal transformations in Bulgaria after 1989, together with ensuing disappointments, economic instability, and rising levels of poverty, frequently prompted individuals to seek explanations and solutions beyond conventional rational and pragmatic frameworks. Many turned to religious practices as a means of coping with critical life situations in daily life (Grebenarova 2000; 2002). In addition to traditional religions, Christian denominations, and sects, new religious movements and forms of spirituality – often classified as alternative – entered the Bulgarian social landscape and rapidly attracted followers (Troeva 2014; Toncheva 2015; Manova 2022a; 2022b).

The dissemination of alternative forms of religiosity and spiritual practices occurs, on the one hand, through the expansive market of literature offering guidance on life, self-improvement, and personal development, and on the other hand, through the increasing provision of organized, fee-based group courses, seminars, and workshops (Bochinger 1994). Through these mechanisms, spiritual practices are effectively economized.

My research is focused on a particular phenomenon within Bulgarian social life: the introduction of a contemporary alternative teaching of foreign origin, closely linked to practices of self-knowledge and self-improvement, which can be situated within the broader framework of New Age spirituality. This article presents

an ethnological study of a group of Bulgarian followers of a religious teaching that has been circulating in the country since the early 2010s. The respondents engage with a microenterprise established in 2011 in Sofia, which organizes and facilitates participation in high-cost courses and seminars based on the so-called Tibetan System for Healing and Self-Development, integrating spiritual and physical practices of Eastern origin. This enterprise was founded as an intermediary for a spiritual school established in Moscow in 1995 under the name “International Academy of the System for Human Self-Development,” which offers activities described as “enlightenment and healing.” The focus of the study are the diverse physical and spiritual practices implemented during the seminars and master classes, conducted both in Sofia and in Bulgarian mountains and Black Sea resorts.

This study is concerned with understanding the motivations and purposes underlying the engagement of Bulgarians of diverse ages and social backgrounds with this particular teaching, as well as their attitudes and expectations toward encounters with alternative knowledge and practices. The analysis will focus on the defining characteristics of the emerging new spirituality among the respondents and the processes through which they construct a collective identity as members of the nascent religious community. The study will address the question in what manner contemporary business interests find a place in the cultivation and dissemination of this alternative spirituality and will contribute to understanding the process of commodification of the new spirituality.

The research employs a combination of 24 biographical and semi-structured interviews, informal conversations with respondents, and participant observation through direct engagement at several events. I have maintained contact with most of the respondents, as well as with the owner of the Bulgarian enterprise, since 2012. My initial involvement was motivated by a personal interest in physical activities for health improvement, complemented by recommendations from acquaintances. These long-term interactions facilitated the establishment of mutual trust with the respondents, enabling them, in most cases, to share personal experiences relevant to the research topics. Additionally, I examined relevant publications on social media platforms and on the websites of both the Bulgarian enterprise¹ and the Moscow-based academy².

The Founder, the Academy and the Novel Spiritual Doctrine

The founder and president of the academy is Oleg D. L., a Russian neurologist with specializations in psychotherapy, manual therapy, and Eastern medical practices, who presents himself as a spiritual teacher and healer. He developed the “Gym Lam” system, which is described as a “unique approach to health aimed at lifestyle change and personal transformation.” According to Oleg, the system is the culmination of extensive research, inspired by the spiritual traditions of

¹ <http://studiogimlam.com/> [Accessed 10 January 2025]

² <https://www.gimlam.ru/> [Accessed 11 May 2026]

the Himalayas and Tibet, where he engaged with various spiritual mentors and healers. He asserts that the core of the system has ancient origins, which he has adapted to address the needs of contemporary individuals. The practice and dissemination of this system, focused on the self-improvement of both body and soul, are claimed to promote exceptional health and facilitate personal transformation, ultimately guiding practitioners toward “high levels of consciousness.”

Oleg asserts that the foundation of his system and his teaching is deeply rooted in the spiritual legacy of Padmasambhava, the legendary Indian Buddhist mystic of the 8th century. Padmasambhava is renowned for introducing tantric Buddhism to Tibet, establishing the first Buddhist monastery there, and laying the groundwork for the Vajrayana tradition, which integrates meditation, ritual, and esoteric practices aimed at both spiritual enlightenment and practical transformation of life.³ Oleg also claims that he draws knowledge from ancient Tibetan spiritual traditions and healing techniques, and combines them with modern medical principles to create a practical and easily applicable system suitable for contemporary practitioners of all ages. The “Gym Lam” system is introduced as based on the idea that human health is a trinity of body, mind, and soul. It applies methods for self-improvement and the development of all aspects of a person’s life, offering solutions to enhance physical, emotional, and energetic health, as well as spiritual growth, improved relationships, and financial well-being. Here, one can observe the approach of holistic medicine, which holds that the body and spirit must be treated together, achieving a more complete and integrated perspective on human health (cf. Sutcliffe 2002). Illnesses are viewed as symptoms of an underlying problem connected to energetic, emotional, spiritual, and other (dis)balances. The system includes techniques for strengthening joints and bones, therapeutic gymnastics for internal organs, methods for energetic self-protection and “unblocking” problematic energy zones, meditation techniques, guidance on healthy nutrition, spiritual practices for achieving personal growth and self-improvement, and attempts to provide scientific explanations for certain spiritual phenomena.

Oleg’s teaching, which has attracted a significant number of followers in Russia and Ukraine over the years, incorporates ideas, beliefs, and spiritual practices influenced by Buddhism. For example, as Oleg explains, divine energy (prana) creates and sustains the universe, and this energy must be ritually received and channeled into the human microcosm to achieve spiritual power and perfection. To achieve these goals some seminar activities include yoga methods (breathing techniques, postures), the study of mudras, and the chanting of Sanskrit mantras to enhance the sense of cosmic vibration in order to initiate processes that connect the practitioner with the divine. During meditation, practitioners are instructed to visualize various deities symbolizing cosmic forces. The aim is to employ methods and practices that “guide” the individual through

³ More details in Doney 2015.

the complex labyrinths of personal transformation and lead them to their “divine essence.” In addition to Buddhist-inspired elements, the teaching incorporates Christian ideas and beliefs, as well as elements from various esoteric traditions, woven together in a syncretic manner. Significant attention is also given to the conscious spiritual work of followers on cleansing their own karma accumulated from past incarnations.

Oleg’s four books, translated into Bulgarian, provide a detailed exposition of the principles and techniques of his system (Lamikin 2011; 2014; 2017a; 2017b). In the introductory sections, specifically written for the Bulgarian readership, it is stated that the volumes present a comprehensive system for nutrition and bodily purification, with claims that the methodology can transform even individuals with disabilities into champions. The technique is portrayed as unique, capable of activating the body’s self-healing processes while simultaneously fostering the development of personality, character, life trajectory, and the inherent unlimited potential of each individual. The books assert that adherence to the practical recommendations contained within each volume will enable readers to become energetically resilient, self-confident, capable of overcoming psychological challenges, and able to assist their relatives in navigating complex life situations. Furthermore, mastering the answers to the questions posed in the texts is presented as a pathway to achieving a happy and energetically balanced life.

Oleg serves as the president of the academy, while his wife fulfills the role of executive director. Regular classes for students in Moscow are conducted during evenings and weekends. In addition to these scheduled sessions, Oleg frequently organizes multi-day seminars and master classes outside the capital, conducted in natural settings and combining practical exercises with lectures. Participation in these events is extensive and requires the payment of an additional fee.

Introduction of the Teaching in Bulgaria

The first Bulgarian adherent of Oleg’s teaching was Christina, who underwent training at the academy in Moscow in 2010 and, in 2011, assumed the role of its official representative in Bulgaria by establishing a microenterprise in Sofia within the service sector. She operates as a teacher and instructor, supported by two assistants whom she has personally trained within the framework of the system. The twice-weekly sessions are publicly presented as “gymnastics for general strengthening and health improvement” and are conducted in a studio described as a “yoga studio.”⁴ Participation is subject to individual payment in accordance with the pricing structure determined by the enterprise. Beyond the physical exercises, the program—under the guidance of the studio staff—includes the instruction and practice of spiritual techniques, guided meditation sessions, the recitation of prayers, and periodic diagnostic procedures involving the measurement of chakras and aura. Participants are also encouraged to adopt

⁴ <https://www.facebook.com/gimlambg> [Accessed 16 January 2025]

specific dietary practices aligned with the system's recommendations. In this way, the core elements of the Gym Lam system are implemented within a localized and institutionalized setting.

Over the course of my research, I examined the social profiles of individuals who approached Christina and became clients of her enterprise, and consequently, adherents of the system promoted by Oleg. The participants ranged in age from 16 to slightly over 70 years and were exclusively urban residents, originating both from the capital and from cities of varying size. Women constituted the majority of attendees, although there were several cases in which both spouses participated, as well as one instance involving a three-member family that included a high school-aged son. The majority of followers, though not all, possessed higher education qualifications; the group also included university students and retirees. Professionally, Christina's clients represented a broad spectrum of occupational backgrounds, including medical doctors and dentists, employees in public and private enterprises, teachers, small and medium-sized entrepreneurs (such as insurance agents, furniture producers, traders, and hotel owners), as well as architects, accountants, and bank employees.

I concur with Franz Höllinger's argument that the affinity of highly educated individuals for holistic practices may be interpreted in light of their more strongly articulated needs for personal experience and self-realization (Höllinger 2022). The predominance of women among the participants may likewise be understood in relation to findings that suggest a comparatively higher receptivity among women to religious and spiritual experiences. Each client approached the practice in search of a resolution to specific personal concerns. The respondents reported a wide spectrum of perceived difficulties, including strained communication with parents, children, partners, or other close relatives; life-cycle and professional crises; a persistent sense of insecurity; chronic illnesses and other health conditions insufficiently addressed by conventional medicine; diminished self-confidence; experiences of fear, anxiety, and stress; feelings of limited life alternatives and social isolation; as well as a broader existential search for meaning, spirituality, and more fulfilling forms of personal realization.

Oleg's first visit to Sofia took place in 2012. In the period preceding the COVID-19 pandemic, Christina's enterprise organized seminars two to three times per year in conference halls in Sofia. These events, lasting three or four days and typically scheduled during evenings and weekends, were structured around lecture series delivered by Oleg on clearly delineated thematic subjects. The announced topics reflected the integrative character of the teaching, combining elements of alternative medicine, spiritual development, and personal transformation. Among them were "Iron Bridges: Healing the Musculoskeletal System," "Psychological and Energetic Self-Protection and the Formation of a Strong Nervous System," "Constructing a New Way of Life in the New World of the 21st Century," "Life Without Medication: Simple and Effective Methods of Healing from Eastern Medicine," "Activating the 12th Level of DNA Energy: Healing

and Rejuvenation at the Genetic Level,” and “Healing of Destiny,” among others. The participation fees were designed to cover the logistical and organizational expenses associated with the events, including venue rental, Oleg’s travel costs and honorarium, as well as the services provided by the Bulgarian enterprise, such as translation into Bulgarian and overall coordination of the seminars.

In addition to the seminars conducted in the capital—which were likewise attended also by participants from other urban centers—Christina’s enterprise organized seven-day master classes on an annual bases during the summer months, between 2013 and 2020. These events took place in mountain or Black Sea resorts in Bulgaria. Participants assumed financial responsibility for their hotel accommodation and meals, as well as a comparatively high participation fee for Oleg’s master class. The daily program followed a strictly structured schedule. Morning sessions were held from 6:00 to 8:00 a.m., followed by additional practical activities from 10:00 a.m. to 12:00 p.m., during which Oleg led physical exercises and spiritual practices in outdoor settings—either in natural surroundings or on the seashore. In the afternoon, he delivered a four-hour lecture. Meals were taken collectively in a designated restaurant hall, according to a menu selected by the teacher, consisting predominantly of foods associated with the so-called Mediterranean diet and excluding alcoholic beverages or coffee. Within this temporally and spatially bounded framework, participants were engaged in sustained and direct interaction with Oleg in his capacity as a charismatic leader and spiritual authority. At the same time, the intensive organization of the daily schedule enabled a high degree of pedagogical supervision and symbolic influence over participants throughout most of the day.

Each lecture concluded around 6:00 p.m. with the assignment of tasks for individual work, which frequently had to be completed in groups after the shared dinner. In this manner, participants were engaged from the early morning hours until late in the evening in structured activities conducted under the direct guidance of the spiritual teacher. The daily program imposed a clear rhythm of discipline and encouraged sustained concentration on both individual self-reflection and collective group processes. The overarching objective of these master classes was to create conditions of temporary withdrawal from everyday social environments. Through deliberate distancing and relative isolation from routine life, participants were encouraged to undertake an intensive process of self-examination and personal transformation, conceptualized within the framework of the teaching as progress along an individual path of self-improvement and self-knowledge.

One of the principal tasks of Oleg and Christina was to seek proximity to sites that had long been recognized as sacred, incorporating them into certain of the practices they conducted. With Christina’s assistance, Oleg selected what is considered the holiest place for the followers of the spiritual teacher Peter Duvnov in the Rila Mountains – the area of the Seven Rila Lakes. As the Bulgarian

researcher Svetoslava Toncheva writes, this locality has become a central sacred topos for the adherents of the spiritual society known as the White Brotherhood. Each year in August, they gather there to hold their spiritual assembly, welcoming the Divine New Year and seeking to transform both themselves and the world (Toncheva 2009). Oleg is well acquainted with the Bulgarian spiritual teaching within the broader field of contemporary new spirituality and with the activity of its founder, Peter Dunov. In his own lectures, he even incorporates quotations from Dunov's teaching.

With the assistance of Christina and his Bulgarian followers, Oleg selected three additional sacred sites in the Strandzha Mountains for conducting certain spiritual practices during the master classes. One of these is located at the very foothills of the mountain, in immediate proximity to the seashore. This is Beglik Tash, one of the largest prehistoric megalithic sanctuaries in Bulgaria, which functioned as a sacred site for approximately two millennia. According to archaeologists, during the second millennium BCE a Thracian tribe arranged massive rock blocks, thereby constructing a distinctive sacred space dedicated to the Mother Goddess and her son. The second selected sacred site lies in the Strandzha locality of Mishkova Niva, where an ancient Thracian sanctuary has been discovered—a cult complex consisting of a domed temple and a tumulus necropolis, dated to the fifth–third centuries BCE and regarded by scholars as a sacred place of the Thracians. The third chosen site is situated in the locality of Gradishte, beneath the peak known as Golyamo Gradishte. There, according to local lore, lies the presumed tomb of the Egyptian priestess Bastet, who, as the legend holds, was born in Strandzha into a noble Thracian family. It is believed that the tomb itself—where ancient (and as yet undiscovered) manuscripts were allegedly preserved—was protected by a powerful energetic field that hindered attempts to reach it. The area surrounding the cave, regarded as the entrance to the presumed tomb, is considered an enigmatic space enveloped in mystery. Oleg had become aware of the existing belief in the site's mystical energetic properties and of the practices aimed at energetic “recharging.”

Oleg succeeds in integrating the characteristics of these localities—constructed as sacred, magical, and highly energetic—into his system of self-improvement and spiritual development. Christina selects hotels in proximity to these sites, in mountain and seaside resorts such as Panichishte, Primorsko, Arapy, and Nestinarka (the latter two within Tsarevo Municipality). Oleg's group of followers typically numbers around fifty to sixty participants. The master classes are organized in deliberate opposition to the everyday and the habitual—situated outside the home and the usual place of residence, removed from urban infrastructure, and in immediate contact with nature. The hotels are located near sports facilities, mountain meadows, or directly along the seashore. Early in the morning, two-hour sessions of physical practices, breathing exercises, team competitions, and group meditations are conducted. Particular importance is attributed to the morning sessions held on the seashore, where special

rituals and prayers are performed to greet the sunrise. These are followed by rather intense physical exertion in the form of team competitions both on the beach and in the sea. Oleg explains that such competitions serve to discipline participants, cultivate patience and endurance, and foster a collectivist spirit. The demanding execution of the physical practices is said to strengthen the participants' willpower. Equally strenuous and physically taxing are the exercises carried out later in the morning at sports facilities located near the hotels.

On one of the seven days of the master class, a ritual ascent of mountain slopes or a pilgrimage to one of the sacred sites is organized for the participants. During rest periods along the route, as well as at the site itself, Oleg delivers lectures, and under his guidance various spiritual practices are performed—meditations, mantras, prayers, breathing techniques, visualizations, and purification rituals in the waters of the Seven Rila Lakes or in the spring waters of the Strandzha Mountains. All these practices are endowed with a ritual character and spiritual significance, their performance intended to exert an effect both on the individual and on the community. Such transformation, according to Oleg, can occur precisely in sacred places. He explains that energetic sites endowed with magical power greatly enhance practices of energetic grounding, energetic protection, and the strengthening of the bioenergetic field. The forces of nature and the sanctity of these locations, he argues, ensure that meditation becomes more readily attainable and more effective.

The sacred mountain occupies an important place in the religious cultures of many peoples (cf. Toncheva 2014). Mountains are conceptualized as sacral spaces, proximate to the divine and conducive to contact with this energy—indeed, at times understood as a temporary sojourn in another world. They are believed to contain portals to other mystical realms. Central to this symbolism is the association with ascent and height as a link between the earthly and the divine worlds, representing a symbolic approach to higher powers. In such spaces, contact with deities and luminous beings—such as angels and saints—is perceived as especially immediate and intimate.

Perceptions and Evaluations of the Respondents.

The Process of Identity and Community Formation

In the course of my research, I sought to ascertain the perceptions and evaluations of the Bulgarian followers of this teaching. The respondents stated that, on a personal level, they gradually achieved transformation through attending sessions at the yoga studio and, above all, through their annual participation in the seminars conducted by Oleg in Sofia, as well as in the master classes. Most interlocutors reported positive changes in their attitudes toward close relatives and toward everyday problems, and even an improved capacity to cope with many of their fears. They described having acquired new knowledge about their health from a holistic perspective and being able to explain the emergence of certain illnesses – either their own or those of family members. They further

maintained that they had succeeded in cultivating positive qualities, such as patience, care, empathy, and kindness. Many asserted that they were now making conscious efforts to restrain certain negative character traits, including pride, aggressiveness, greed, and resentment.

The majority of respondents shared that, through the performance of the practices and through their interaction with the teacher, they experienced both physical and emotional comfort, felt a sense of calm, and were able to restore a previously lost psychological balance. They expressed conviction that they had developed self-discipline—primarily through the physical practices—and had come to recognize their personal responsibility, for example with regard to preserving their health and maintaining harmony in their relationships with close family members. They also claimed to have begun to experience greater compassion toward others and to strive to understand the problems faced by friends and relatives. A significant number of respondents reported that, for a long time, some relatives and friends were surprised by their zealous commitment to Oleg's teaching and did not respond positively to the major changes in their lives. Some interlocutors even recounted experiencing ridicule from people from whom they had not expected such reactions. Gradually, however, attitudes toward them began to shift, or they themselves ceased interacting with those individuals.

None of the respondents complained about the strenuous physical exertion, which often resulted in prolonged muscle pain. On the contrary, the strength-based practices were perceived as challenges aimed at fortifying the will and cultivating endurance, precisely in accordance with the intentions of their spiritual mentor. All participants expressed respect for their teacher and reverence for his knowledge and attitude, without manifesting doubt regarding the superhuman abilities he claimed to possess – such as communicating with higher beings, levitating, or guiding processes of regression. It was evident that the respondents desired to receive personal and precise guidance from their enlightened teacher. During the group sessions, I was impressed by their collective efforts to achieve synchrony, the mutual support they extended to one another in fulfilling assigned tasks of self-preparation, and their strong and unconditional faith in the teacher's instructions. Group dynamics emerged as a particularly noteworthy phenomenon: a shared sense of benevolence, support, harmony, and synchrony prevailed during the seminars and master classes. What was common to all participants was the belief and hope that, through their personal efforts and with the support of their supernaturally gifted teacher and healer, they would be able to transform their lives and destinies. It is likely for this reason that they did not experience the constant oversight and frequent reprimands on his part—especially in cases of difficulty with the demanding practices—as burdensome or oppressive.

My observations provide grounds to speak of both personal and social effects for the participants. On the one hand, there is a widespread conviction of undergoing an upward personal transformation, accompanied by satisfaction with the substantial changes that have occurred in their way of life. For example, the

newly acquired knowledge and the social skills they develop are highly valued by the respondents. These include improved communication with a wider range of people, overcoming the fear of public speaking, and managing everyday stress more effectively. Nearly all participants succeed in achieving changes—sometimes quite significant—in their dietary habits, renouncing certain food products (most notably meat and dairy), as well as alcohol and coffee consumption. Some respondents even define the Gym Lam system itself as a way of life and describe their success in transforming many of the physical and spiritual practices into daily routines. They frequently speak of the stimulating effect they experience when reading and rereading Oleg's books (a practice he himself encourages) and when listening to recordings of his lectures, made and distributed by Christina.

On the other hand, among the participants in the seminars and master classes a new community is gradually formed. The ritual ascents of mountains, the collective spiritual practices at sacred sites, the group sessions conducted in natural settings, and the sharing of meals generate the positive dimensions of collective life within a spiritual community of like-minded individuals. In this way, a shared identity as followers of a spiritual teaching centered on self-development and self-improvement is progressively constructed—an identity that, however, must be continuously maintained and reaffirmed. This becomes possible through systematic practice in the yoga studio in Sofia and through annual participation in Oleg's seminars and master classes. The teaching has facilitated the creation of a new and relatively stable community of adherents, one that could potentially counteract the deepening processes of alienation in society and the pervasive insecurity of everyday life. A more critical perspective, however, may discern the manipulative strategies embedded within the teaching and the imposition of the mentor's charismatic authority—along with that of his Bulgarian disciple Christina, albeit to a lesser extent. For the time being, a markedly strong trust in the charismatic leadership of their spiritual guide is observable among the followers.

New Spirituality as Business

Finally, I will note the economic aspect of the development of new spirituality, which is clearly observable in the system of self-development under study, as well as in the spiritual teaching offered to Bulgarians. In this context, access to new alternative spiritual knowledge requires participants to pay a relatively high price. Oleg and his Bulgarian disciple Christina have demonstrated—and continue to demonstrate—a highly developed sense of business acumen and market orientation over the years. They have succeeded in creating and maintaining well-functioning enterprises that offer high-priced services. Oleg's teaching is integrated into highly commercialized structures, namely the Moscow-based academy and the Sofia-based enterprise.

The yoga studio in the Bulgarian capital continued its operations even during the years of the COVID-19 pandemic, encouraging followers of the system to

attend not twice, but three times per week. Christina, following Oleg's guidance, emphasized that through collectively performed prayers, as well as physical and spiritual practices, students would become more resilient to the virus or experience a milder course of illness. Oleg prepared up-to-date lectures on the benefits of practicing his system in coping with the contagion. Accordingly, Christina's enterprise generated increased profits through the more frequent paid visits to the studio in 2020–2022. In addition, she organized paid online seminars with Oleg's newest lectures for the Bulgarian followers, since he was unable to travel from Moscow to Sofia due to pandemic-related restrictions and, later, the outbreak of the war in Ukraine. Access to these virtual sessions also carried relatively high fees, yet the interest of the Bulgarian followers did not diminish, despite their unanimous acknowledgment of the significant difference compared to direct, in-person contact and immediate interaction with the teacher.

In the case under study, the successful marketization of the new spirituality and the economic commodification of spiritual practices become clearly recognizable. Under the influence of modernity, it appears that the spiritual and sacred have taken on commodity forms, and holistic practices have been extensively commercialized. The requirement to pay high fees to access sought-after alternative spirituality can be understood from the perspective of the postmodern economy and the capacity to combine spiritual pursuits with entrepreneurial initiative.

This clearly visible commercialization of the physical and spiritual practices offered by the Gym Lam self-development system, however, is not uniformly or unreservedly accepted by all Bulgarian followers. The majority do not challenge the financial aspect and regard the payment of high fees as a natural part of life and work within a market economy, as well as, on a personal level, a reflection of their own success or of their aspiration toward it. Some even take out bank loans or borrow money from relatives in order to participate in the seminars and master classes. There are also instances in which Oleg "rewards" a particularly devoted follower—who has already invested considerable sums over the years but is temporarily experiencing financial difficulties and cannot afford an upcoming seminar—with free participation in a seminar or master class. One such case involved a 55-year-old woman from Svishtov who had recently lost her job; she was granted free attendance at the master class, although she still had to pay for her hotel accommodations in Panichishte in 2014.

I also encountered a small number of Bulgarian followers of the system who were critical, believing that "true" spirituality should not be commodified to such an extent. Three of these respondents even ceased attending the yoga studio, seminars, and master classes. Prior to their withdrawal, in conversations among themselves, they expressed reproach, arguing that the constant demand for money subjected them to psychological pressure and troubled them not so much financially as morally. In these documented cases, there is a clear expression of doubt among participants as to whether "true spirituality" can be compatible with capitalist practices of monetization.

Conclusion

Oleg presents his work as a modern adaptation of ancient Tibetan practices, intended to meet the needs of contemporary practitioners seeking holistic health, self-development, and spiritual insight. Oleg's teaching manifests as flexible, dynamic, and adaptive. It shares several characteristics with other spiritual teachings associated with New Age culture, as defined and described by Wouter Hanegraaff (Hanegraaff 1996: 365–366). These include, for example, a strong emphasis on the present moment and on remaining engaged in the world while seeking meaning within it; holism, connecting the physical, psychological, and emotional dimensions; belief in (self-)development and in “growth,” understood as a movement “forward” toward harmony (defined as a form of evolutionism); the idea that human consciousness (and thought) creates reality and that its evolution will lead to perfect knowledge; and, finally, the expectation of the “New Age” alongside the notion of an impending profound spiritual and universal human transformation⁵. The creator of the “Gym Lam” system manages to integrate into the courses and master classes in Bulgaria also parts of the local spiritual heritage, e.g. knowledge of Thracian sanctuaries, local beliefs in the influence of holy places known from antiquity, as well as parts of the spiritual teachings of Petar Dunov. Here we find one of the characteristics of New Age, described by Michael York as the “appropriation” of various spiritual traditions from foreign cultures in a globalized society (York 2001).

In their pursuit of spirituality, Bulgarian followers of Oleg's teaching strive to acquire alternative spiritual knowledge while also engaging in personal development. They seek guidance from a spiritual mentor on how to achieve transformation and perfection, as well as how to improve their health and psychological well-being. My respondents sincerely believe that changes in the world will be facilitated through the individual changes they themselves undergo. During the seminars and master classes, held in carefully chosen natural settings, participants experience a sense of wholeness, peace, goodwill, and tranquility. At these sessions—particularly at the sacred sites—the newly forming spiritual community experiences itself most tangibly and vividly. Moreover, the sacred places themselves appear to sanctify the emerging community.

Thanks to his carefully developed system, his professional knowledge of medicine, and his personal qualities, the spiritual teacher is able to respond to the spiritual needs of people in Bulgaria and attract them as followers. He successfully adapts his teaching and messages to address the current social and personal challenges faced by contemporary individuals in the post-socialist space, thereby maintaining their interest and reinforcing his charisma. Although his authority and control, as well as the high fees for accessing spiritual knowledge, raise certain research questions, from a social and personal psychological perspective, his teaching provides followers with practical ways to cope with the challenges and difficulties of contemporary life. The case study I have present-

⁵ For more details on Hanegraaff's research, see Kyurkchiev 2022.

ed is yet another example of the commodification process observed by scholars in relation to the new spirituality and, in particular, the New Age Movement (see York 2001). My research showed how, by turning the sacred into a commodity, Oleg and Christina successfully sell a range of spiritual knowledge as client services to willing consumers, and thus the teacher, the student and their followers actually participate in the contemporary market of spiritual consumers in Bulgaria. In the search for markets outside their homeland, Oleg's enterprise manages to find one in Bulgaria and increase its profits in the context of the economy of postmodern society.

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Ambient Faith, Illuminated Crosses, and the Politics of Public Space in Southeast Europe (20th–21st Century)

Abstract: The present paper aims to examine the practice of installing tall crosses in Bulgaria, especially from the beginning of the 21st century onward, through the concept of ‘ambient faith’ [Engelke 2012]. To what extent, and in what ways, is the erection of giant illuminated crosses near settlements an expression of religious faith? This is the main research question I pose. Empirically, the paper is based on the following: a) written sources; b) a brief ethnographic study in one village. I will address the following topics: the concept of ‘ambient faith’; the first known case of installing a giant cross in Bulgaria (Krāstova Gora [Mountain of the Cross]) in the Rhodope Mountains; a comparison between contemporary cross markers and traditional obrok [shrine] open-air crosses; and parallel to similar practices in cross-cultural perspective. In conclusion, I will offer an interpretation of the Bulgarian examples through the lens of the concepts of ‘ambient faith’ and ‘material religion’. I argue that giant Bulgarian illuminated crosses implicitly emphasize that Bulgarian identity is inseparable from its Orthodox genealogy, regardless of the degree to which an individual Bulgarian is a practicing Christian or not. By reinforcing the public aspects of religiosity, ambient faith contributes to the introduction of new forms and a renewed life of religion.

Keywords: *ambient faith, illuminated crosses, public religion, material religion*

Introduction: theoretical background

The clear signs of religion’s return to the public sphere from the last quarter of the 20th century onward have led to the revisiting and relativization of Eurocentric theories of secularization. This, however, did not bring debates about nature and place of religion in the contemporary world to an end; quite the opposite happened. Discussions continue around concepts such as secularism and desecularization (Berger 1999; Dobbelaere 2004; Cannell 2006), public religions and the de-privatization of -religion (Casanova 1994: 5–6), post-secularism (Habermas 2010: 15–24; Reder & Schmidt 2010: 1–15), and others. One problematic point in these discussions, in my view, lies in situating them in a global context especially after distinguishing Europe as the continent that is “the exception to the rule” (Davie 1999: 65–85), and even more so given the multifaceted developments within Europe itself (Tomka 2001: 43–56; Davie 2007: 21–37). In this context, the widely cited concepts of “believing without belonging” and “vicarious religion,” introduced by Grace Davie (Davie 2007), are productive.

These theories, however, also have limits to their applicability, including in light of the criticisms of Davie's work (Voas & Crockett 2005: 11–28; Crockett & Voas 2006: 567–584). Davie's two theoretical models are valid (and forged) primarily in the (Western) European context, as is shown by the contrast between Western Europe and the high level of religious commitment in the United States.

Against this background, how should we assess the significance of religions and religiosity in Bulgaria? According to comparative data from the European Values Study (2008–2017), Bulgaria ranks among the countries positioned in-between the most religious countries (Turkey) and the most secular countries (Czech Republic) (Wilkins-Laflamme, Voas, Hewlett 2025: 313–316).¹ Specific particularity of Bulgarian religious landscape after the end of communism is the institutional weakness of the Bulgarian Orthodox Church (84% of the population is Eastern Orthodox), due to collaborationism of high clergy with once-communist secret services (Metodiev 2007: 4–19; Metodiev 2010). The heterogeneous trends in Christian religiosity (including the post-socialist rise of Pentecostalism—see Altanov 2010; Slavkova 2007) are, to a certain extent, in contrast to the trend of “Islamic revival” and the new for the country penetration of Salafi influences. In this sense, one can speak of religious polarization (Wilkins-Laflamme, Voas, Hewlett 2025: 303–330), although Islam in Bulgaria also has many faces (Troeva-Grigorova 2012: 5–23).

If, however, we apply a broader approach to defining religion, i.e., including at minimum contemporary spirituality and New Age beliefs and practices (Troeva-Grigorova 2014: 153–169; Manova 2022; Karamelska 2023), we would obtain a much more complex and multifaceted picture of religious practices in Bulgaria. To the development of institutional religions, we must add the blurring of boundaries between public and private forms of religion, and between sacred and secular practices and beliefs.

The concept of ambient faith and the research aim

The main goal of the present text is to explore a recent social practice in Bulgaria: raising giant illuminated crosses in the public spaces—in light of the concept of “ambient faith” (Engelke 2012), forged in a local English context.

Engelke does not offer a strict definition of this concept, but rather applies a descriptive approach to it, first outlining the distinction between the notions of ambience and context. “Ambience is akin to what anthropologists have often called “context,” which is itself indexed to the more general notion of “culture,” but I want to distinguish ambience from context. For one thing, ambience often conveys a more distinct sense of what is in the background, especially in acoustical terms. So, when one has a romantic candlelit dinner, complete with violin

¹ Research conducted with different methodology reaches to different (yet controversial in my view) conclusions: “crisis of religious values”, globally and in Bulgaria in particular (Nazarska, Shapkalova 2015: 71, 74).

music, one says the ambience is right, not “the context is right.” [...] Ambience is also more pertinent here than context because of the latter’s historical association with matters of language. [...] My interest in ambience is part of a broader effort to encourage attention to the sensual and material aspects of social analysis, especially when it comes to semiotic modalities and forms. [...] I argue here that ambience can be a helpful concept with which to make sense of the ways in which religion can be understood (and gets understood) as public or private” (Engelke 2012: 158).

The empirical example to which Engelke applies the concept of “ambient faith” consists of initiatives by the Bible Society (1804) in Swindon: a) placing angel figures high above the space of a busy shopping center before Christmas, and b) organizing public Bible readings in places such as cafés and even pubs.

Engelke’s concept of ambient faith has received a response, in the anthropology of religion. The heuristic potential of this concept, however, is more significant, especially in the context of the religious landscapes in Europe. The examples I present here from Bulgaria - the practices of erecting giant crosses in public (and usually - secular) space - should demonstrate this.

Research methods and theoretical assumptions

The construction of giant illuminated crosses—expensive and technologically complex projects—has become more frequent in Bulgaria over the past twenty years, and this phenomenon—so far very little studied—invites for interpretation. It puts to the test the concepts of sacred and profane, religious and secular, public and private space, and it requires an explanation of the motivations of the social actors who carry it out. To what extent, and in what ways, does the erection of large, illuminated crosses in open-air locations near populated areas reflect the religious motivations of their initiators? How does the local population perceive the illuminated crosses? These are the main research questions I pose.

The first study of the installation of rather large crosses in public spaces in Bulgaria is authored by Evgenia Troeva. Her attention is directed toward a broader range of phenomena. Alongside the giant illuminated crosses, rising twenty or more meters high, she also examines crosses of more modest dimensions and includes traditional *obročén* (votive) crosses. The geographical scope of her study is likewise extensive, encompassing dozens of examples from across the territory of Bulgaria. The author interprets the practices of erecting “monumental crosses” from several perspectives, but primarily as expressions of various secular motivations: as manifestations of competing identities (between Christian communities and Muslim minority communities); as attempts by the clergy and other initiators to “imbue the crosses with a sacred element”; and as efforts by local elites “to consolidate their positions of leadership” (Troeva 2016: 90–91).

My research has limited objectives, and it has no ambition to explore all settlements near which large crosses have been erected. Here I present six

cases that are comparable to one another. Empirically, my research is based on analysis of a) published information (printed or Internet sources); and b) oral data obtained through fieldwork. I rely on eleven thematic interviews (see Kvale 2007) in the city of Blagoevgrad² and in the village of Novi Han near Sofia, including a short field trip to Novi Han in October 2025. I also use my observations including ten interviews taken during earlier field trips in 2021–2023 in the city of Velingrad and the municipality. The interviews have not been deposited in a public archive but remain part of my personal archive. This corresponds to the internationally accepted ethical principles of anthropologists to anonymize their interlocutors, in contrast to the opposite practice of depositing field materials in a public archive. The latter is related to the once-classification of ‘ethnography’ under socialism as an ‘auxiliary historical discipline’.

This paper primarily focuses on the case of Novi Han, while the remaining five examples are outlined schematically due to space limitations.

The theoretical framework of the study is the so-called “material turn” in the study of religion, which entails, at the very least, a shift of focus from the mental and spiritual aspects of belief -from symbolism and ideologies in the study of religion — toward its material forms of expression (Meyer, Houtman 2012; Hazard 2013). “New materialism rejects a priori oppositions between subjects and objects”, that is, between the subjects of faith and its material objecthood. This implies attention to the spatial aspects of religion, to religious materiality as an expression of power and discipline (Hazard 2013: 59, 61–62). Attention to ambient faith (after Engelke 2012) is in line with this theoretical current. In this sense, the installation of giant illuminated crosses requires a careful revisiting of the concepts of public and private, sacred and profane space, and religiosity and secularism in the contemporary Bulgarian context.

Empirical cases and descriptive analysis

The prototype of today’s giant illuminated crosses in Bulgaria can be considered the cross at *Krăstova Gora* [The Mount of the Cross] in Rhodope mountains, near the city of Asenovgrad. Its erection was related to an invention and creation of a new shrine (of 1930-s) of powerful charisma, due to the missionizing activity of an itinerant visionary, preacher and prophet Yordan Dryankov, locally known as [Brother] *Brat Yordancho*. In 1933–1936 he spread oral narratives of dreams and visions in surrounding villages, concerning the holiness of *Krăstova Gora* - a place where, according to his belief and the legends spread by him, a fragment of the True Cross was buried. With the involvement of Royal family: Princess Evdokia, her brother Tsar Boris III (1918–1943), and with the assistance of a military unit, a tall bronze cross was erected in 1936 on

² Several Blagoevgrad’s ethnologists helped me to collect oral information concerning the illuminated cross in the city. My appreciation goes to: Gergana Hristova, MA, Borislav Mutaftchiski, PhD student, and Dr Pavlina Solachka.

Krăstov Vrah at an elevation of 1,413 meters. After 1989, *Krăstova Gora* gradually became a large-scale religious complex, including a church and twelve chapels, and today it is the largest center of pilgrimage and religious tourism in Bulgaria outside the major monasteries. *Krăstov Vrah* is also a site of pilgrimage for Bulgarian Muslims (also known as *Pomaks*) from the surrounding villages (Valtchinova 2012: 69–93; Troeva 2011).

The installation of the cross on *Krăstova Gora* occurred later, following the narrative construction of the holiness of a peak in the Rhodopes. In this respect, the Mount of the Cross differs from the cases examined below. Nevertheless, I include this shrine in my analysis as an earlier precursor to the initiatives to erect giant crosses in Bulgaria and as a model of social action in which explicitly religious motivation predominates.

The notion of illuminated crosses as a form of divine protection is expressed in all six examples I examine. In some cases, it appears in an explicitly religious context, while in others it emerges in a context in which the religious component is blurred. This notion, which originates in the canonice Christianity, is reinforced by the syncretic religious practices and beliefs widespread in the Balkans, concerning the sacralization of natural sites (Sikimić, Hristov 2007), by installing crosses, usually made of stone. These open-air shrines (named in Bulgaria differently: *obrok* [offering], *krăst* [cross], *poKrăst* [baptism], *čerkva* [church], etc.) are devoted to various patron saints³. Local populations consider these cross-marks as sacred sites, and the areas around them are believed to enjoy divine protection that keeps them safe from natural disasters. Local communities, in particular in Bulgaria, perform special ritual on the day of the patron saint and offer a blood sacrifice—*kurban* (Stamenova 1985: 149–154; Mutafov 1989: 194–221; Popova 1995: 145–170; Benovska-Sabkova 2000). Rituals referred to were banned, and the shrines, respectively, were almost forgotten under socialism but the rituals were quickly re-vitalized after 1989 (Benovska-Sabkova 2000). The combination of belief in the divine protection of these sacred places—of the cross in particular—and the ritual associated with it constitutes a resilient cultural pattern that not only re-emerged after the end of atheist prohibitions. Its vitality, seemingly at odds with data showing low attendance at church services in postsocialist Bulgaria (Wilkins-Laflamme, Voas, Hewlett 2025), deserves separate analysis. I argue that all this is background for the perception of the protective power of illuminated crosses.

In 2013, an illuminated cross thirty-three meters high was erected above the city of Blagoevgrad,⁴ initially at the initiative of the mayorship of the city.

³ For most exhaustive overview of Bulgarian rituals dedicated to patron-saints, see Stamenova 1985: 149–154.

⁴ 86136 people lived in Blagoevgrad in 2025. Available at: <https://www.grao.bg/tna/tadr-2025.txt>. Accessed: 20.02.2026.

The construction continued throughout three consecutive mayoral terms, during the terms of Lazar Prichkapov (2002–2007), Kostadin Paskalev (2007–2011), and was completed in 2013 during the term of Atanas Kambitov (2012–2019). A chapel has been built nearby. Religious symbolism intertwines with secular motivations such as tourism and recreation: the cross is connected to an eco-trail, rest areas, and even a barbecue nearby. The construction was carried out through a public-private partnership: with municipal funds and with funds raised through donations.

As I have not met with the ex-mayors, I do not have reliable information regarding their intentions and personal motivations for implementing this project. Conversations with residents of the city, however, show that presently the illuminated cross is perceived in an ambiguous and contradictory way: both as a religious symbol and through the secular uses of the space where it has been erected. On the one hand, a recurring motif in the short interviews is the (religious) idea that the cross is a form of divine protection: it protects the city and its inhabitants. The interviews also show, however, that the sacred aura of the cross—emphasized by its hyperbolized materiality (its size and its visibility through nighttime illumination)—is not capable of fully transforming the spatial characteristics of the place where the cross is installed. This mountainous area above Blagoevgrad allows the cross to be visible from a great distance. At the same time, it is perceived as ambivalent because of its secular uses. After the installation of the cross, the area known as *Zaeva Polyana* combines the characteristics of an attractive natural site with those of a local landmark. Since 2013, it has become a route for hiking excursions among the local population. One of the interviews conducted associates the illuminated cross solely with the secular use of the site, as a route for outings. At the same time, *Zaeva Polyana* is known among local residents as a meeting place for couples seeking privacy rather than a religious symbol. In line with this tendency are also local rumors about the misuse of public funds during the construction (during the term of Mayor Kambitov).

The perception of the glowing cross above the city of Blagoevgrad in a religious light is blurred when compared with the other two examples from the Blagoevgrad region that I discuss below. It is likely unsettled by the ambivalence of the uses and meanings associated with the location where the cross is installed. The case demonstrates the relevance of the concept of ‘ambient faith’ (Engelke 2012), since the specific ambience casts a shadow and obscures the primary meaning of the religious symbol, despite its hyperbolized materiality and sensory presence as a luminous cross visible even at night.

The analysis of two other recent installations of tall crosses (from 2025) in the Blagoevgrad region leads to the assumption that these initiatives are on their way to becoming an established cultural model in the region. In 2025 only, at least four settlements of Blagoevgrad district, initiated installation of tall cross-

es: villages of Banya, Gostun⁵, and Ploski, and the town of Hadzidimovo. I will explore the latter two of them on which more information is available - the village of Ploski and the town of Hadzidimovo.

They are located near the Bulgaria-Greece border. For this reason, one of the interviewees suggested that these initiatives replicate what has been seen in Greece: giant crosses near settlements. An interesting fact is that the interviewees mention the crosses in Greece, but not the same practice in North Macedonia—a country that is just as close a neighbor to Bulgaria. The tall crosses in North Macedonia appeared as an expression of tension between Orthodox Macedonians and the Albanian minority (which is predominantly Muslim) in the republic (Zhelyazkova 2003). Tension escalated, in particular, after the 2001 conflict between the government forces of North Macedonia, and Albanian insurgents, the latter also linked to the Kosovo Albanians (Pettifer 2001; Neofotistos 2012; Bieber 2020). Referring to the crosses in Greece rather than those in North Macedonia is likely a result of the more intensive contacts between Bulgaria and Greece (especially after Bulgaria's accession to the EU in 2007), mainly due to the tens of thousands of Bulgarian tourists visiting Greek resorts.

The religious motivation of the initiators for erecting tall illuminated crosses, as well as the idea of divine protection, were explicitly expressed during the installation of the crosses in 2025 near the village of Ploski and the town of Hadzidimovo.

The cross near the village of Ploski⁶, 12 meters high, was installed on 13 August and consecrated on 15 August 2025 (the feast of the Dormition of the Holy Mother of God). It was a personal donation from a Bulgarian politician born in the village; besides his religious motivation, the donor also referred to the cross as a form of divine protection. According to the donor, the village's salvation from devastating forest fires in the same year 2025 is evidence of God's intervention. It's worth mentioning that undertaking was institutionally supported by the Bulgarian Orthodox Church: the cross was consecrated by the diocesan metropolitan Seraphim:

This powerful symbol of faith, hope, and spiritual protection is a gift to the residents of Ploski from GERB member of Parliament for Sandanski, Georgi Georgiev, to remind everyone of God's love for us and of our love for Him and for one another - this love has preserved our people through the centuries. Let us remember how, united with God's help, we stopped the fire and our houses remained unharmed, even though from a human perspective it seemed so terrifying and impossible. Where our united human strength ended, there God's

⁵ Ilinden press 2025, available at: <https://ilindenpres.bg/45111-osvetiha-dva-krusta-na-krustovden-nad-selata-banya-i-gostun/>. Accessed: 1.02.2026.

⁶ In 2025, in Ploski lived 484 people. Available at: <https://www.grao.bg/tna/tadr-2025.txt>. Accessed: 20.02.2026.

intervention began! [...] This has long been my dream — I wanted a cross to be visible from afar above my village, one that would protect it, watch over it, and show that people with strong faith, pious and good Christians, live here. We are installing it on the eve of the church feast of the Holy Mother of God, with the blessing of the Metropolitan of Nevrokop, Seraphim.⁷

The indisputable religious motivation and the expectation of divine protection unite the initiatives for erecting tall crosses in Ploski and in Hadzhidimovo⁸, even though in the second case the context is more complex. On the one hand, the initiative to install a luminous cross (twenty-one meters high) above Hadzhidimovo comes directly from the Bulgarian Orthodox Church: the local parish priest is the organizer of the undertaking. On the other hand, the published information shows that the religious motivation is shared both by the initiators (the church) and by the local community. Within a short time, the population collected most of the necessary funds through donations. The shared support for the initiative is also demonstrated by the fact that it is the result of a public–private partnership, insofar as the municipality of Hadzhidimovo transferred free of charge to the Bulgarian Orthodox Church the plot of land on which the cross is installed.

The 21-meter illuminated metal cross now protects the residents of Hadzhidimovo municipality from evil and misfortune. Three days before the coming of the Nativity of Christ, the entire Christian symbol was assembled with a special crane. ‘We succeeded in this God-pleasing deed. We proved that when we have a cause, we can achieve it. We still have a lot of work to do. We must provide electricity; for now the cross shines with the help of a battery. We will improve the entire area around the Christian symbol, and we also want to build a chapel there,’ said Father Lazar today, who serves in the church ‘Dormition of the Mother of God’ in the town of Hadzhidimovo, above which the cross rises. More than a year ago the decision was taken to erect this Christian symbol. The idea was coordinated with the Metropolitan of Nevrokop, Serafim, and his blessing for this God-pleasing deed was received. (Admin 2025).

An interlocutor of mine from Blagoevgrad also mentioned a second, hidden agenda behind the social action: the cross above Hadzhidimovo has another purpose as well: to support Orthodox Christian identity as a symbolic counteraction to the strong Muslim presence (villages compactly populated by Bulgarian Muslims/ “Pomaks”) in the region, including within the municipality

⁷ <https://pirinnews.com/novina/17799/12-metrov-pravoslaven-krust-be-izdignat-nad-selo-ploski/>. Accessed: 1.02.2026.

⁸ In 2025, in Hadzhidimovo lived 2654 people. — Available at: <https://www.grao.bg/tna/tadr-2025.txt>. Accessed: 20.02.2026.

itself. This points to the presence of religious polarization (Wilkins-Laflamme, Voas, Hewlett 2025: 303–330) in Hadzhidimovo and the municipality of the same name. Since the Ottoman period, the Christian cross in its various applications has become a symbol marking the distinction between Christian and Muslim communities.

In Velingrad—a city inhabited by both Orthodox Christians and Bulgarian Muslims⁹—an illuminated 22-meter cross was consecrated on the Eve of Christmas in 2016, by the diocesan bishop and local clergy. Project was funded by public-private partnership: plot of land was donated by the municipality; and private donations from around 800 people. The initiative for the cross is the one of the Development Association “Western Rhodopes”—Velingrad, chaired by Plamen Angelov, and the civic Initiative Committee “Let’s Work for Velingrad” headed by Sofia Klyuchkova. The declared religious motivation of the initiators is consonant with the religious perceptions within the local community. One year after the installation of the cross, on the eve of Christmas 2017, a natural phenomenon was observed in the sky above Velingrad, which was interpreted as a divine sign: angel wings, a harbinger of grace (Sokolova 2016).

Among the donors of the cross were quite a few Muslims. The speech of the municipal mayor, Dr. Kostadin Koev, emphasizes the Christian motivation behind the initiative, but it also conveys another message that deserves attention: „It is a joy for all of us that the consecration of the newly built Christian cross takes place on the eve of the brightest holiday, the Nativity of Christ. Velingrad is a religiously mixed region; we are proud and have repeatedly proven our tolerance and that we can be united!“ (Velingrad.bg).

An anonymous publication claims: „The illuminated cross is one of the emblems of Velingrad and symbolizes the long, harsh, but successful struggle against the centuries-old Ottoman oppressors“ (Love Velingrad 2016).

In fact, although the population of the city of Velingrad is confessionally mixed (Orthodox Christians and Sunni Muslims), the city itself is surrounded by villages compactly populated by Bulgarian Muslims (“Pomaks”). Like in many places in Western Europe, in Velingrad the signs of Muslim “otherness” are also visible through objects of “material religion”¹⁰: the mass construction or renovation of mosques in the surrounding Muslim villages of the municipality; or the presence—though sporadic—of Muslim clothing. Many Muslim women from the villages prefer standard European clothing when traveling to the town (Benovska-Sabkova 2006: 187–202). Nevertheless, in the town one can notice headscarves, traditional local Muslim costumes, or more rarely a hijab. In this context, the mayor’s speech also addresses the boundary between Christians

⁹ 25163 people lived in the city of Velingrad in 2025, according to the official statistics. Available at <https://www.grao.bg/tna/tadr-2025.txt>. Accessed: 1.02.2026.

¹⁰ Unlike Western Europe, though, Bulgarian Muslims in Velingrad (and in Bulgaria overall) are historic, local and endogenous community.

and Muslims and reveals religious polarization, despite the declared tolerance (bvtvovinite.bg 2016).

The cross is installed on the boundary between the inhabited urban space and the surrounding environment: at the edge of the town cemetery, next to the grave of the fallen communist activist Vela Peeva (1922–1944), who is the patron of the city (Love Velingrad 2016). The choice of space to locate the cross suggests a reinforcement of local identity through the (ambivalent) combination of religious and political symbolism.

The village of Novi Han is located thirty kms away from Sofia. In 2022, a giant illuminated cross thirty-six meters high was installed and consecrated.¹¹ The village lies at an elevation of 631 meters, and two smaller mountains (Lozenska and Vakarelska) form part of its territory; it has 3,400 inhabitants, consisting of Orthodox Christians and overwhelmingly ethnic Bulgarians.¹²

Novi Han is one of the postsocialist examples of successful economic development of a “village near the large city.” More precisely, the municipality of Elin Pelin to which Novi Han belongs, is one of the most prominent cases of peri-urbanization, or suburbanization of Sofia. “Since the end of socialism in 1989, Sofia’s peri-urban growth has been driven primarily by affluent households relocating from the central city to its scenic southern outskirts in search of a higher quality of life. In this sense, the process exhibits the classic signs of Western-style suburbanization and is qualitatively different from the peri-urban development that occurred under socialism” (Hirt 2013: 755). Elin Pelin, and respectively Novi Han, are at present a part of the agglomeration area of Sofia.

The territorial scope of the metropolitan agglomeration encompasses 7 municipalities and comprises 146 individual settlements. [...] Božurište, Kostinbrod and Elin Pelin, along with Sofia municipality itself, are the municipalities with the best demographic indicators within the agglomeration area. [...] Together with the demographic processes, the increasing soil sealing is another evidence of the spatial expansion of suburbanization. The largest share of new soil sealing was observed in Sofia municipality itself (approximately 370 ha), followed by Elin Pelin (105 ha), Božurište (46 ha) and Kostinbrod (32 ha). Based on the intensity of new constructions and population

¹¹ I do not include in my analysis the recent (2025) installation of a twelve-meter three-dimensional crucifix at an intersection in the Elin Pelin, the municipal center, due to the different materiality of the monument and the different set of questions (including canonically Christian ones) that it raises. The crucifix was installed in a place where numerous traffic accidents have occurred; the opinion has spread among local people that after the installation of the cross, the accidents have stopped (Naidenova 2025).

¹² The census of 2021 did not provide data concerning the ethnic composition of Novi Han’s population (Available at: www.nsi.bg. Accessed: 1.11.2025). However, 16 inhabitants of Novi Han declared themselves as Roma and 5 as “others”, during the previous census of 2011, among the majority of ethnic Bulgarians. (Available at: <https://www.nsi.bg/census2011/pagebg2bfe5.html?p2=175&sp2=190>. Accessed: 1.11.2025).

change, the so-called zone of active influence of the agglomeration core has been outlined. The zone is made up of settlements meeting two conditions: they have a high intensity of new constructions. (Kazakov, Hardi, Ilieva et al 2024: 32–33).

Besides, they experience migratory increase that compensates for natural decrease of population between 2011 and 2021 (Kazakov, Hardi, Ilieva et al 2024: 32–33).

Over the past thirty-five years, Bulgarian villages overall have experienced varying levels of negative demographic trends and depopulation (Mikova 2024: 139). Against this background, the demographic condition and demographic growth of Novi Han are positive, especially as of being a prominent part of capital's agglomeration area. Public amenities and local infrastructure are in very good condition: new and well-maintained administrative buildings, a school, a kindergarten, and children's and sports playgrounds. The considerable proportion of young people in the population certainly contributes to this.

The economic and demographic potential of Novi Han allows it to invest substantial resources, in particular in a non-economic initiative such as a symbol materialized in giant illuminated cross. Matters discussed up to this point help us better understand why Novi Han, out of all the villages near Sofia, decided to take on this particular project.

Next answers are related to a second cluster of questions: Who are the social actors who carried out this project? What was their motivation? How are crosses perceived by the local community and individuals? Practical steps in implementing the project between 2020 and 2022 point toward the answers. The initiators of the cross's construction were the village mayor, Aleksandar Stoichkov, and the mayor of the municipality of Elin Pelin, to which Novi Han belongs. The project was carried out using a collaboration between public and private sectors. According to the interview with Stoichkov¹³, about one-third of the funds were public, provided from the budget of Elin Pelin Municipality, while the remaining funds came from local donations in Novi Han, mainly from local businesses, and in the form of volunteer labor and materials.

To present the local religious landscape adequately, another fact must be noted. Novi Han is home to a nation-wide significant project of religious (Orthodox Christian) charity: St. Nicholas Orphanage, which houses around four hundred people, children and adults. The efforts of the once local priest, Archimandrite Father Ivan (Ivanov) (who passed away in September 2025), made the existence of Orphanage possible. This is one of the few large-scale charitable projects supported by the Bulgarian Orthodox Church during post-socialist period.

Mayor Stoichkov describes himself as “a believer,” likewise the municipal mayor of Elin Pelin as “deeply religious.” *“We did it with a pure heart, out of*

¹³ Interview was taken on 13.11.2025, Novi Han.

faith,” Stoichkov says. The initiators also wished to build a chapel at the foot of the cross, but they did not have enough funds. This testifies to the primacy of religious motivation among the initiators, although there were other motives as well. The idiom of faith permeates Mayor Stoichkov’s speech: „In some way, things related to faith happen very easily. The moment there is a need for money, someone calls and offers money.“

With the same implication – of divine intervention – Stoichkov smoothly transitions to a new narrative, concerning the current religious project: the restoration of a once-destroyed chapel, Sts. Constantine and Helena, near the village (locality named *Kapaklija*). A chapel once stood at this location, which Stoichkov notes dated back to the 11th century (source of this information is unclear). However, chapel was destroyed during the communist era. In 2007, the then-village administration began construction to restore the chapel. Then mayoress of Novi Han initiated laying new foundations of the building, but construction stopped due to lack of funds, and the unfinished structure became overgrown with wild vegetation. During the clearing of the area in the summer of 2025,¹⁴ workers discovered the foundations laid in 2007:

As soon as we cleared the trees, we saw the restored foundations. While I was thinking about it, our priest called — I realized we were thinking about the same thing. Then the municipal mayor, Ivaylo Simeonov, also called, likewise proposing to restore the chapel. “A builder calls... he has had misfortunes—he offers to help. Sometimes things are determined from above. Within fifteen minutes, everyone connected to this thing had called.

This story has the characteristics of a religious narrative, similar to the widely distributed narratives of conversion or miracles found throughout the Christian world (Benovska 2021: 93–131). It is marked by a “semiotic ideology,” expressed in the narrative construction of an “ethically saturated” world, in Webb Keane’s terms: “[T]here are no accidents, and no neutral causality, and any event or thing might turn out to be a sign of an agent (and most significantly when they are divine or satanic), something subject to ethical evaluation.” These “semiotic phenomena make it possible for people to take their experiences of things and events as evidence of a hidden agent with intentions . . . constructed in ethical terms” (Keane 2014: 318, 314, 319).

Echoes of this “semiotic ideology” can be found in comments by local residents. In the two or three years following the installation of the cross, more children have been born in the village, says an unfamiliar woman who overhears my conversation with the municipal secretary. The mayor himself shares this “hermeneutic”: for the first time in these years, the number of newborns exceeds the number of deaths, and the village shows positive demographic growth.

¹⁴ FB page of the municipality of Elin Pelin. Available at: <https://www.facebook.com/watch/?v=2154835811693095>. Accessed: 1.02.2026.

The empirical fact that birth rates are also influenced by the presence of young people who have migrated from Sofia to the village does not contradict the narratives of divine grace—and this, too, is part of the “ethically saturated world.”

The erection of the cross was carried out with the knowledge, approval and support of the Bulgarian Orthodox Church (in this case, the Sofia Diocese), despite certain individual voices in the village claiming that the spatial orientation of the cross was not “according to the canon.” “*This is a symbol, not a cross on a church dome,*” Mayor Stoichkov counters. In March 2020, the late Patriarch Neofit personally led the groundbreaking ceremony of consecration of the site. The fact that this consecration was unannounced (practically secret) is telling since it coincided with the restrictions on mobility and social gatherings during the COVID campaign. This shows that the initiators considered the project so important that they disregarded COVID restrictions. The clergy from the Sofia Diocese implemented consecration of the completed cross in 2022.

Shortly after the cross was erected, a local historian initiated the practice of offering a *kurban* on the Feast of the Cross (14 September). In this way, the illuminated cross is given the significance of traditional *obrok* crosses (see above) that sacralize specific localities.

The readiness with which local companies joined the project for erecting the cross suggests the presence of religious motivation, to one degree or another, among local entrepreneurs as well. The metal structure of the 36-meter cross weighs over 70 tons, and the pedestal beneath it contains 300 cubic meters of concrete. The heavy structure was transported by trucks in three parts, each 11 meters long. The safety assessment of the structure was carried out by architects. The metal components were treated using the “cold galvanization” method, for which they had to be transported to Romania. The zinc coating, as well as the lighting installation of the cross, were donated by a local company. Undoubtedly, this is a significant material contribution to the project, and it is not the only one. Other companies assessed the safety of the structure—its weight, dimensions, and method of installation; still others studied the topography of the area and determined the location from which the cross would “be visible from all sides.”

It cannot be claimed that religious motivation is shared by the local community as a whole, nor that the cross is perceived in the same way by the village’s inhabitants. According to a young woman who migrated from Sofia to Novi Han, the cross was erected “for purely promotional purposes.” Other opinions are rather influenced by New Age ideology and terminology. According to these views, it is installed in a place with a “high energy field.” This opinion reminds me of the tourist interest in the famous “Vortex”¹⁵ sites in Sedona, Arizona (US). The vortexes attract streams of New Age followers or simply pil-

¹⁵ Initial meaning of ‘vortex’: “something that resembles a whirlpool” (Available at: <https://www.merriam-webster.com/dictionary/vortex>). Accessed: 20.02.2026.

grimage tourism to the city, which is one of the prominent centers of New Age pilgrimage in the United States.¹⁶

Other residents of Novi Han look for practical benefits from the cross as a local landmark: for them, it offers an opportunity to develop hiking trails in the natural surroundings of the village. The holding of a *kurban* ritual near the cross, on the other hand, grants it the status of inherited traditional symbols and practices which, incidentally, are debatable from a theological point of view but are nevertheless tolerated by the Bulgarian Orthodox Church.

The divergent opinions show that the local community is not unanimous in its perceptions of the illuminated cross. On the one hand, the initiators and sponsors of the project share, to some extent, religious motivation regarding the cross as a symbol. This project was constructed “from above,” even if at a local level. Representatives of the local elites—political—administrative and economic—conceived and carried out the project of the group of committed local Orthodox believers supported it. Visual documents—photos and video—show a community of like-minded supporters who are united around this project. A photograph from the consecration of the site shows that the small community of initiators and sponsors consists entirely of men, which points to the gendered dimensions of power relations in the village. Initiators are otherwise part of the circle of those locals attached to Orthodox Christianity; latter participated in the official consecration of the cross in 2022, and at least on that day numbered several dozen people. The existence of a community of active believers is indirectly indicated by the first attempt (from 2007) to restore the chapel “St. St. Constantine and Helena”, during the term of another mayor of Novi Han. The delineation of these two social circles (in terms of religious commitment)—narrow and somewhat broader—testifies to the phenomenon of “vicarious religion” (Davie 2007). The cross is a religious value for the active minority of believers who practice religion on behalf of the rest while the latter stick to the more general notion of the (divine) protective power of the cross.

The incompleteness of my empirical examples limits the possibility of formulating firm generalizations. Nevertheless, the fact that the erection of giant crosses in public space is an established practice in countries neighboring Bulgaria, such as Greece and North Macedonia, points to a certain tendency toward the transformation of religiosity (in this case, Orthodox Christianity) in the direction of strengthening its public aspects (Casanova 1994; Meyer, Houtman 2012: 2; Kaell 2016: 1–34). The existence of a similar, though not identical, of 3000 tall roadside crosses in a region far removed from the Balkans – Catholic Quebec (Kaell 2016: 1–34) – suggests broader processes of rethinking both secularism and religion in the contemporary world.

¹⁶ “In Sedona, a vortex is a place where the earth’s energy is said to be especially strong. People visit these sites for personal healing, spiritual growth, and to experience the calming and transformative energies. The vortexes are often associated with certain types of energy: masculine, feminine, or balanced.” – Sedona 2025. Accessed: 20.02.2026.

Conclusions: Illuminated crosses, ambient faith, and the politics of public space

The increasingly frequent recent practice of installing giant illuminated crosses is most likely also partly related to the improved economic situation in Bulgaria during the second and third decades of the 21st century, despite the country's serious social and political problems. In four of the examples, the cases concern one medium-sized town (Velingrad) and three small settlements (Novi Han, Hadzhidimovo, and Ploski), which have mobilized resources significant for their size, in projects with significance of symbolic character.

In all cases, the initiatives to install a giant illuminated cross comes “from above,” from local elites/authorities, which is reasonable given the high cost and technological complexity of such projects.

In all the examined cases, though to varying degrees, a religious motivation on the part of the initiators for erecting illuminated crosses can be identified, if we return to the initial research questions. This motivation is explicitly stated and emphasized, and the involvement of the Bulgarian Orthodox Church in these projects reinforces this conclusion. Ethically saturated narratives, marked by a semiotic ideology, clearly testify to the religious commitment of some of the social actors.

It is more difficult to establish the perception among local communities because of the internal diversity of values within them. What unites all the examined cases is the perception of the illuminated crosses as a material form of divine protection, and this represents adherence to fundamental religious values—or at the very least, sensitivity to religious symbols. Secondly, local communities have supported the installation of the giant crosses through donations (with the exception of the small village of Ploski, where the initiator was also the main donor). The connection between religious motivation and fundraising campaigns is most clearly visible in the town of Hadzhidimovo, where the decisive portion of the funds was raised precisely through donations, and within a short period of time. In larger communities such as Blagoevgrad, however, different perceptions can be found, including entirely secular ones (such as turning excursions to the cross into a tourist route). In Velingrad, support through donations was also considerable (eight hundred donors), but the participation of Muslims among the donors—expressed as a sign of tolerance and consensual attitudes—also indicates the internal complexity of the picture. Despite the explicitly declared tolerance on the part of the initiators as well, the erection of the cross is perceived by the local community as a reaction to polarization. A similar polarization, although unannounced, is also present in Hadzhidimovo.

Religious motivation is also a reaction to modern secularism, through the strengthening of the public aspects of religion. The statement of Novi Han's mayor: “*This is a symbol, not a cross on a church dome*”—clearly reflects the late modern European trend of distancing oneself from institutional religion. In the contemporary world, “conceptual distinctions between publicity and pri-

vacy are difficult to maintain in the first place and that they are, in any case, always relative” (Engelke 2012: 155). The cross signs reshape public space and reinforce the public aspects of Orthodox religiosity, distinguishing themselves from institutional faith related to church attendance. Like the Canadian roadside crosses, the Bulgarian illuminated crosses “exemplify a form of engagement with secularism that corresponds to what anthropologist Matthew Engelke calls “ambient faith”: religiosity that filters in and out of sensory and conscious space” (Kaell 2016: 1). The Bulgarian illuminated crosses address the relationship between public and private space not only through legal actions (transferring or donating appropriate plots of land). Placing a cross in nature, in an open space, blurs the boundaries between the secular and the religious, demonstrates an effort to strengthen the public aspects of religion, and highlights its material and sensory dimensions. By situating the crosses in elevated natural locations, the initiators are guided by a pursuit of visibility - i.e., the public significance of the crosses. (The location of the cross in Novi Han was selected by qualified geodesists to ensure visibility from all directions.).

The hyperbolized materiality of the crosses and their visibility are further reinforced by installing them in high mountainous areas. The material aspects of the illuminated crosses—gigantic size and visibility at night (unlike “traditional” cult buildings)—create the conditions for the implicit hegemony of the cross as a visible symbol that structures space both vertically and horizontally. Through their visibility, the giant crosses “open” the space and imprint it with ambient faith: an expression of an internal polarization between secularity and religious symbolism. Similar to the hidden messages of Canadian roadside crosses in Catholic context, the giant Bulgarian illuminated crosses implicitly emphasize that Bulgarian identity is inseparable from its Orthodox genealogy, regardless of the degree to which an individual Bulgarian is a practicing Christian or not. By reinforcing the public aspects of religiosity, ambient faith contributes to the introduction of new forms and a renewed life of religion.

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The village of Novi Han, 2025. Photo: the author



**Consecration of the ground
of the future cross: Novi Han,
2022. Photo: courtesy to Mayor
Alexandre Stoichkov**



**Installing the cross: Novi Han.
Photo: courtesy to Mayor
Alexandre Stoichkov.**



The cross near Novi Han. Photo: courtesy to Mayor Alexandre Stoichkov.



The illuminated cross near Novi Han. Photo: courtesy to Mayor Alexandre Stoichkov.

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Ethnic and Religious Spaces in the Diaspora Context: A Theoretical Approach

Abstract: Nowadays, in contemporary Diaspora studies, the concept of “space” is effectively being revised and significantly expanded, moving from a geographically limited territoriality to a social structure. The article explores the proposition that ethnic and religious spaces in diaspora environments transcend their role as purely physical places of residence and ritual performance. Rather, they emerge as social constructs that afford a deterritorialised community the means to re-establish its spatial moorings. Ethnic space is conceptualised as a system of symbolic boundaries that upholds collective identity amid conditions of deterritorialisation, whereas religious space functions as a mechanism of “sacred emplacement,” through which rituals concretize and sustain connections to both the ancestral homeland and religious tradition. In theoretical frameworks, these dimensions are frequently investigated separately, resulting in the spatial interplay between ethnic and religious factors in diasporic contexts. This pattern has produced a theoretical divide between the sociology of ethnicity (Barth 1969; Brubaker 2005) and the spatial anthropology of religion (Knott 2005). The article based on comparative and integrative theoretical analysis examines the components of ethnic and religious spaces as theorized by scholars in sociology, social anthropology, religious studies, and other disciplines, in the context of deterritorialisation.

Keywords: *Ethnic space, Religious space, Deterritorialisation, Third space, Spatial production, Armenian Diaspora, Symbolic belonging, Social construction of space, Symbolic boundaries, Transnationalism*

Introduction: Key concepts and Methodology

Within the framework of Diaspora Studies, the concept of “space” has gained renewed theoretical prominence over the last few decades, transcending mere geographical or physical definitions. From the mid—20th century onward, space gradually shifted away from exclusively geographical perspectives—moving through stages of measurability—to be reconceptualised as the outcome of social relations, dynamically embodied in social, cultural, and religious processes (Lefebvre 1991: 8, 14, 67; Soja 1989: 76–77, 120–125; Tuan 1977: 5–7). In the Social Sciences, space is increasingly regarded as a socially constructed phenomenon, shaped through relations and everyday practises. For example, according to Lefebvre’s, this is termed “Spatial Practice” and “Representations of Space” (Lefebvre 1991: 8–14). In diasporic conditions,

space emerges as a social, symbolic, and institutional construct that is continually reproduced through community practises, memory politics and identity formation. Bourdieu, in its turn, presents the notion of “symbolic system” (Bourdieu 1989: 14) and explains that physical space is transformed into social space through mechanisms of power and fields. These general theoretical foundations of the social construction of space acquire a distinctive application in the diasporic context, forming what Brah calls “diasporic space” (Brah 1996: 16), that is a complex domain in which trajectories of displacement, settlement, and memory intersect, becoming a multilayered cartography for the reconstruction of identity.

For the analysis of ethnic space, the theory of ethnic boundaries serves as a fundamental tool (Barth 1969). We are guided by the approach that ethnicity is not an isolated cultural unit but the outcome of social interaction, which manifests in spatial forms. The religious factor is examined through the lens of spatial anthropology, where the religious space is defined as the process of sacred space (Knott 2005: 103) through which a deterritorialised community materialises its spiritual connection. This approach allows religious structures to be viewed not merely as sites of ritual performance but as centres for the preservation of ethnic identity and the organisation of space.

Ethnic space is typically defined through mechanisms of group belonging, social boundaries, and cultural differentiation (Barth 1969: 1–10), and in the diaspora it is understood not so much as a stable entity but as a social phenomenon and social practise (Brubaker 2005: 1–4). At the same time, religious space in diaspora context is constituted around ritual practises and religious institutions (Knott 2005: 60).

Another approach encountered in the literature posits that, in diasporic contexts, ethnic and religious spaces operate not merely in parallel but as interconnected dimensions, forming multilayered social spaces that simultaneously encompass various levels of belonging, memory, and power (Brah 1996: 4–10). These approaches suggest that ethnic and religious spaces in the diaspora are best understood not as separate areas, but as interconnected parts of a broader social space. This is particularly evident in the case of the Armenian Diaspora, where for example the church frequently functions not only as a sacred site but also as an ethnic centre, providing community cohesion, preservation of historical memory, and transmission of identity across generations (Bakalian 1993: 91–102; Panossian 2006: 87).

Accordingly, the purpose of this article is to expound how these spaces are socially constructed, materialised, and reproduced under conditions of migration and deterritorialisation. Despite the broad array of theories addressing this issue, the theoretical core of the present study centres on the conceptual frameworks of Barth, Brubaker, Bourdieu, Knott, Soja and others, that most effectively contribute to revealing the symbolic and structural specificities of diasporic ethnic and religious spaces.

The theoretical—methodological foundation of this study is built upon an interdisciplinary paradigm that integrates the sociology of space, the anthropology of ethnicity, and religious studies. We are guided by the premise that space in the diaspora is the product of social production (Lefebvre 1991), in which ethnic boundaries (Barth 1969) and religious emplacement (Knott 2005) function as complementary factors. This complementarity is particularly pronounced in classical diasporas, where these dimensions frequently overlap (Liberatore; Fesenmyer 2018: 1–5)—for instance, in the Armenian (Vardanyan 2021: 50–80), Jewish (Encyclopædia Britannica 2026), Irish (Barlow 2017: 13, 46–47), and Chinese (Tan 2018) diasporas.

Similar theoretical and analytical approaches will be applied in our subsequent empirical research within the Armenian Diaspora. And in the framework of the present article, certain aspects of the proposed provisions are substantiated through few examples of the Armenian community in Greece¹. The selection of Greece as a key Balkan context enables the empirical illustration of how theoretically defined “ethnic spaces” and “religious spaces” become materialised in specific diasporic practises. The observations of the Armenian community in Greece presented in this article do not claim to offer a comprehensive empirical analysis; rather, they serve as illustrative case examples to demonstrate the organic linkage between the proposed theoretical propositions and diasporic realities. Representations of social spaces, commemorative practises, community institutions serve to concretize the article’s theoretical framework and its relation to the subsequent empirical material.

Conceptualization of Ethnic Space in the Diasporic Context

The conceptualization of ethnic space in the diasporic context requires abandoning the perception of space as merely a static geographical environment. The fundamental theoretical foundation of this process is Barth’s paradigm of ethnic boundaries, which holds central significance for the analysis of diasporic ethnic spaces. According to that, the identity of ethnic groups is not based on the pure or isolated preservation of cultural features, but is formed and maintained through the continuous construction and reproduction of social boundaries. In other words, ethnicity exists not so much by virtue of internal cultural content as through the boundary-drawing processes that are established in the course of intergroup relations (Barth 1969: 10–15). The distinction between “we” and “they” is a social-practical process that is constantly re-signified in conditions of interaction. These boundaries are not fixed or naturally given entities but the outcome of social relations, which can intensify or weaken depending on the specific historical, political, and spatial context. From this perspective, ethnic boundaries should be

¹ The research was conducted by the Department of Diaspora Studies at the Institute of Archaeology and Ethnography, National Academy of Sciences of the Republic of Armenia, in the cities of Athens and Thessaloniki, Greece, 2024.

understood as dynamic mechanisms through which communities define the scope of their belonging and regulate relations with the external world. In its turn, the reproduction of these boundaries in diasporic conditions acquires a distinctive spatial expression. Ethnic space becomes precisely the environment in which boundary in which boundary in which boundary-drawing processes gain drawing processes gain drawing processes gain visible and tangible embodiment, materialising through community institutions, cultural centres, ecclesiastical life, linguistic environments, and everyday social practises. Here, space functions not merely as a place of residence, but as a socio-spatial field for the organisation and differentiation of identity (Wimmer 2008: 970–975).

In the context of Barth's theory, ethnic space serves as a filtering mechanism that simultaneously enables the community to engage in the socio-economic life of the host society while preserving the symbolic integrity of group identity. Thus, space becomes a type of strategic site that regulates cultural borrowings and prevents assimilation, thereby maintaining the spatial distinctiveness of the ethnic "we." In this sense, the ethnic space in the diaspora context can also be regarded as a distinctive form of "situated" space (Clifford 1994: 318–319), where the community, situated beyond the borders of the homeland, creates new anchors for the reproduction of identity within the receiving society. This type of space becomes the mechanism through which the diasporic group reaffirms its ethnic autonomy, maintaining boundaries not only at the symbolic but also at the material level. Thus, Barth's theoretical framework makes it possible to interpret diasporic ethnic spaces as spatialized forms of social boundaries, in which communal belonging is continually reconfigured in conditions of contact and coexistence with the "others" (Barth 1969: 11–16). Barth explains how ethnic boundaries are created and maintained. However, the question remains about the conditions under which these boundaries become meaningful and visible. Brubaker's processual understanding of ethnicity addresses this issue more directly.

The paradigm of boundaries is further deepened by Brubaker's observations, that argues that ethnic groups should be viewed not as stable, pre-given subjects, but as variable quantities that are activated only in specific contexts. The diasporic ethnic space is not a permanently existing static place, but rather an "event" that "ignites" and materialises at moments of social and political mobilization (Brubaker 2002: 168–170).

From this perspective, the ethnic space in the diaspora can exhibit varying degrees of so-called density. In everyday life it may be weakly expressed, yet during events of communal significance such as national holidays, church feasts and ceremonies or political actions, the sense of groupness sharply intensifies, transforming the physical locale into a highly bounded ethnic environment. Here Brubaker's approach makes it possible to understand that the maintenance of ethnic space requires constant "meaning work", through

which group members reaffirm their belonging to the given place (Brubaker 2002: 167–168). For example, *On the day of the Genocide commemoration, Armenians gather near the Zangak [the bell] ... the Greeks who pass by know that this is Armenian [place]... everyone knows that April 24 is the Armenian Genocide Day*². [These structures function as symbolic anchors, territorializing collective memory and inscribing Armenian presence in the Greek urban landscape].

Generally, commemorative gatherings illustrate how ethnic belonging is enacted through collective participation and shared symbolic practises. In this context, the annual commemoration of the Armenian Genocide on 24 April reaffirms Armenian identity and renders it publicly visible within the wider urban environment. This supports Brubaker's understanding of ethnicity as situationally activated and reproduced in specific social contexts.

So, in diasporic conditions, we define ethnic space not as island—like or isolated places, but as dynamic processes in which boundaries become more or less visible. This perspective makes it possible to explain the vitality of the diaspora: it is able to survive within the host society precisely because its spatial boundaries are flexible and can be activated when necessary, thereby ensuring the internal cohesion of the group without complete or total isolation from the receiving society.

The “eventful” nature of ethnicity becomes necessary to identify the internal mechanisms that condition the individual's periodic return to ethnic space and the integration of this environment into the structure of his or her identity as a “natural” and taken for granted reality (Brubaker 2002: 163–189).

The occasional activation of ethnic belonging, however, does not in itself explain why individuals repeatedly return to particular ethnic environments and experience them as familiar and meaningful. Addressing this requires attention to the internalized dispositions through which ethnic space is perceived, inhabited, and reproduced in everyday life.

And here, according to Bourdieu, the concepts of *habitus* and social field appear, that enable us to conceptualize ethnic space not merely as a system of external boundaries, but as a deeply internalized social structure that is inhabited and reproduced through individuals' everyday actions, perceptions, and embodied dispositions (Bourdieu 1977). This approach reveals that diaspora ethnic space is not a static, externally imposed construct, but a dynamic process shaped and sustained by individuals through their practises and social relations, simultaneously internalizing and reproducing these structures. Where *habitus* is the mechanism through which the diasporic individual recognizes and makes sense of their ethnic space. It is not a conscious and deliberate awareness, but rather a set of ingrained dispositions that incline the person toward community

² In-depth interview N 18 (Education), Field research archive, Department of Diaspora Studies NAS RA, Athens, 2024.

centres—the church, ethnic neighbourhoods etc. Hereby, ethnic space is transformed into a social field in which the individual invests and reproduces his or her cultural capital. (Bourdieu 1977: 72–79, 159–197).

The above approaches make it possible to see that the ethnic space in the diaspora is maintained not through coercion, but through practical sense. It constitutes a domain in which the diasporic *habitus* finds its corresponding objective structures. When an individual enters ethnic space, their internalized dispositions align with the logic of that space, thereby ensuring the natural and continuous reproduction of ethnic boundaries across generations. Therefore, ethnic space in the present study is conceptualized as a combination of physical and symbolic spaces, where social relations are transformed into spatial practises that allows us to conclude that diasporic ethnic space is not merely a place, but an organized experience that is nourished by the individual's internal dispositions and reinforced by the objective existence of communal institutions (Bourdieu 1990: 13–14). Bourdieu's framework explains how ethnic space is embedded in everyday practise, but it does not fully account for the broader social production of space. This wider perspective is more fully developed in the spatial theories of Lefebvre and Soja.

The transition from Bourdieu's analysis of the internalized *habitus* to the socio-geographical level of the production of space makes it possible to conceptualize ethnic space as a multilayered construct. In this context, the theoretical approaches of, for example, Lefebvre and Soja are central to defining diasporic spatiality as a complex synthesis of material (real) and symbolic (imagined) domains. Lefebvre's methodology allows the research scope to be expanded, moving from the level of individual dispositions to the paradigm of the social construction of space (Lefebvre 1991: 38–40).

The conceptualization of ethnic space attains its full theoretical embodiment within the framework of the “production of space” concept (Lefebvre 1991; Soja 1996). While sociological approaches (Barth 1969; Bourdieu 1977) emphasise boundaries and *habitus*, Lefebvre's methodology enables us to view ethnic space as a complex “spatial triad,” in which the physical, the mental, and the social sides of it are interwoven. (Lefebvre 1991: 38–39, 50–52).

Lefebvre's ideas receive their further development in Soja's concept of “Thirdspace,” which conceptualizes diasporic ethnic space as simultaneously real and imagined—a duality that resonates with Anderson's notion of nations as “imagined communities” (Anderson 2006). The diaspora ethnic space represents precisely this triad spatiality in which the diasporic individual unites local experience with historical memory, thereby forming a unique landscape that Soja calls “expansive space” where the carrier (diasporic individual) is neither fully “there” (in the historical homeland) nor fully “here” (in the host country) (Firstspace—Secondspace—Thirdspace) (Soja 1996: 6–7, 11, 57–58). For example, *Some ancestral traditions are preserved even today, for example, instead of offering flowers or other gifts at a distant relative's funeral, the family member*

*makes a donation to the Church or a national union*³. [They brought the custom of giving flowers with them from their homeland and turned it into giving money, a custom that was transformed under the influence of the new environment].

This example illustrates how cultural practises are maintained and re-configured in new social settings. Such customs remain embedded in everyday community life, thereby sustaining collective memory and a sense of belonging across generations in the diaspora.

Consequently, ethnic space in the diaspora is regarded in this study as so called active social project. Far from merely preserving identity, it actively constructs it by generating alternative geographies. The theoretical perspectives of Lefebvre and Soja provide the foundation for understanding that the presence of ethnic space in the diaspora is not accidental, but a deliberate act of spatial self-determination undertaken by the community, enabling the diasporic *habitus* to materialise and manifest as a tangible social reality (Lefebvre 1991; Soja 1996). While these spatial theories offer a conceptual framework for understanding the production and organisation of diasporic space, the work of Bakalian and Panossian demonstrates how such spaces are experienced and reproduced within Armenian diasporic communities.

The frameworks of spatiality gain particular relevance when adapted to diaspora social realities through the seminal works of Ani Bakalian and Razmik Panossian. Bakalian's "Armenian-Americans: From Being to Feeling Armenian" (1993) and Panossian's "The Armenians: From Kings and Priests to Merchants and Commissars" (2006) allow to applicate the general theories of space and identity to the transformative processes of the Armenian Diaspora, revealing the distinctive features of ethnic space and identity transformation. The analyses enable the theorization of diaspora spatiality not as a static phenomenon, but as a dynamic social process shaped and reshaped through the interaction of community institutions and individual practises. The conceptualization of ethnic space in the diaspora reaches its full theoretical embodiment also through the analysis of identity evolution and the spatialization of historical memory. In this context, Bakalian's thesis of the transition "from being to feeling Armenian" provides a key lens for understanding the functional transformations of ethnic space. Bakalian demonstrates a crucial transformation—from "ethnic being" (being Armenian) to "ethnic feeling" (feeling Armenian)—where identity is sustained not only through cultural practises, but through symbolic belonging and community institutions (Bakalian 1993: 1–15). This process directly affects the perception of space: whereas in the initial period ethnic space represented a vital necessity for social survival, while in subsequent generations it is transformed into a "symbolic place." Here, space ceases to function as a permanent place of residence and becomes a domain into which the individual enters selectively in order to reaffirm

³ In-depth interview N 16 (Religious), Field research archive, Department of Diaspora Studies NAS RA, Athens, 2024.

their ethnic identity and symbolic capital, where it is preserved not through geographical isolation, but through symbolic participation (Bakalian 1993: 179–210).

The symbolic space also acquires its political and historical depth in the analyses of Panossian. The author emphasises that diasporic identity is constructed in the constant tension between dispersion and centralization. Ethnic space in the diaspora appears as a materialised fragment of the “imagined community” (Anderson 1983: 6–7) where historical memory is transformed into spatial practise. According to Panossian, the diasporic community creates its own “place” by employing religious and educational institutions as symbolic centres of national sovereignty (Panossian 2006: 299–355). It unites the symbolic belonging with the striving for transnational unity. From this perspective, the conceptualization of ethnic space culminates in the recognition that space in the diaspora is not an inherited given, but a constantly constructed and re-signified project that enables the overcoming of geographical distance from the homeland and the creation of stable anchors of identity in a foreign environment.

And finally, the works of Vahe Sahakyan significantly deepen the conceptualization of ethnic and religious space in the context of the Armenian Diaspora by distinguishing spaces of difference and spaces of belonging as interconnected and at the same time differentiated dynamic constructs. The author’s analysis demonstrates that in Armenian diasporic communities, ethnic space operates as a field of negotiation, where Armenian identity is simultaneously reproduced and re-signified within the local socio-political context through religious institutions and cultural practises (Sahakyan 2018: 250–260). This approach enables a comparative examination of how diasporic spatiality serves as a mechanism of hybrid belonging, simultaneously preserving group distinctiveness and facilitating integration into the host society. And shows that ethnic space in the diaspora is not a fixed territory. It is a social reality that is constantly negotiated through memory, institutions, daily practises, and feelings of belonging.

Religious Space in the Diaspora: Theoretical Perspectives

The formation of religious space constitutes one of the most important mechanisms for the preservation and reproduction of communal identity. In conditions of migration, when the community finds itself in a new socio-cultural environment, religious institutions often assume not only ritual but also social, cultural, and symbolic functions. In this sense, the church in the diaspora can be regarded as a central node of identity, where the spatial and institutional bases of belonging are formed. Here we can apply Bourdieu’s concepts of the “religious field” and *habitus*, which allow for a clearer understanding of how religious practises shape distinctive behavioural and symbolic codes thereby legitimizing the certain forms of ethnoreligious belonging (identity). In this context, the church in the diaspora is transformed into a socio-spatial environment where the reproduction of religious sentiments is intertwined with the continuous reproduction of communal and ethnic identity (Bourdieu 1991: 1–44).

The theoretical foundation for the analysis of religious space leads to Knott's spatial methodology, which conceptualizes religion not as an abstract ideological system, but as a localized social practise. Within this methodological framework, religious reality is understood as a socio-spatial construct, emerging from the dialectical interplay between the material environment (perceived space), the conceptual dimensions (conceived space) and the lived social experiences and subjective relations (lived space) (Knott 2005: 33 as a socio-spatial construct 52, 33–49, 33–52).

From this perspective, diasporic religious space is not confined to the mere architectural structure, but rather manifests as a process of the spatial embodiment of the sacred. Through this process, the community establishes its own “emplaced religion” within a foreign geographical environment (Vásquez 2011: 10–12). For example, “*The community does not celebrate Greek holidays; we are simply part of them*”⁴. [Such gatherings produce publicly legible ethnic space, marked by ritual, memory, and collective visibility]. “*In Athens, the Armenians gathered in the Neos Kosmos district, and a church and a school were built there*”⁵. [Neos Kosmos becomes a spatially concentrated Armenian enclave—what we may describe as a “diasporic micro—territory”—where education, religious practise, and everyday sociality overlap].

The concentration of religious, educational, and community institutions within the same neighbourhood creates a shared social setting in which different spheres of community life intersect. In this sense, Neos Kosmos is not merely a location, but a lived social space where social relations, collective memory, and everyday practises contribute to the formation and reproduction of Armenian identity.

In the context of diaspora, also the construction and function of the church often reflect the community's aspiration to assert its presence and materialise its collective identity within a new spatial environment.

Religious symbols and rituals function as spatial intermediaries that integrate the sacred into the realm of lived space. This process not only renders the surrounding social environment meaningful but also ensures the ontological security⁶ of the diasporic community, fostering a sense of stability and continuity

⁴ In-depth interview N 16 (Religious), Field research archive, Department of Diaspora Studies NAS RA, Athens, 2024.

⁵ In-depth interview N 18 (Education), Field research archive, Department of Diaspora Studies NAS RA, Athens, 2024.

⁶ Ontological (here, ontological security) — a sociological concept primarily developed by Anthony Giddens that characterises the confidence of an individual or a group in the continuity of their identity and the stability of the surrounding social and material world. See, Anthony Giddens. 1991. “Modernity and Self-Identity: The Self and Society in the Late Modern Era”. In the context of the diaspora, ontological security implies a steadfast sense of “being-in-the-world,” which mitigates the crises of displacement and existential uncertainty. See, Brah, Avtar. 1996. *Cartographies of Diaspora: Contesting Identities*.

within the context transnationalism (Brah 1996: 200–207). In diasporic context, such practises may be understood as symbolic means through which communities reaffirm their ties to historical and cultural heritage. By connecting everyday experience with shared tradition and collective memory, they contribute to the construction of meaningful frameworks of belonging.

Such space synthesizes local communal experience with historical memory and sacred tradition, thereby securing a symbolic nexus with the homeland. This interrelation of memory, belonging, and spatial practise suggests that religious space in diaspora extends beyond ritual observance, functioning as a broader framework for the organisation of community life.

In this context, Brah's concept of diaspora space is pivotal, wherein diasporic reality is viewed as an intersectional domain of diverse historical experiences, trajectories, and belongings. Within such an environment, religious institutions are transformed into points of confluence, where unique forms of ethnic and religious identity are simultaneously reproduced and synthesized (Brah 1996: 175–205).

The social nature of religious space is also effectively interpreted within the theoretical framework of Lefebvre's "The Production of Space", where the space is not a mere physical container but a socially produced reality, wherein lived space holds central importance as a domain of subjective experiences and symbolic meanings. In this context, the church in the diaspora is transformed into an environment where the material is synthesized with collective memory and the re-experiencing of identity (Lefebvre 1991: 1–19, 33–42, 362). At the same time, religious space in the diaspora is constructed through the constant interplay between the boundaries of the sacred and the profane⁷ (Lefebvre 1991: 226). According to classical sociological paradigms, the sacred is defined in opposition to the profane, with these boundaries being continuously reconstructed through collective rituals and practises (Durkheim 1995: 34–44; Eliade 1963: 20–24). In the diasporic context, ecclesiastical space often transcends purely religious functions, transforming into a condensed field of social interaction, cultural practises, and communal organisation. For example, "*They sing on Christmas Eve and there are Greeks who will wait for you to sing for them too... they know that we celebrate on January 6, but we also celebrate with them on December 26... many will wait to hear in Armenian...*"⁸. [Here, ritual

⁷ Profane (secular, mundane): This term characterises the ontological realm that lacks religious or ritual significance, pertaining instead to the everyday, practical activities of human existence. Derived from the Latin *profanum*, which literally translates to "outside the temple", the term inherently underscores its spatial essence. In contemporary spatial theories, the profane is conceptualized not as the mere absence of the sacred, but as the foundational platform with which the sacred maintains a constant interaction and engages in 'boundary negotiations'. The Nature of Religion; Lefebvre, Henri. 1991. The Production of Space.

⁸ In-depth interview N 15 (Education), Field research archive, Department of Diaspora Studies NAS RA, Athens, 2024.

performance becomes a public marker of Armenianness, audible and visible to the Greek environment. Ethnic space manifests as a performed, sonic, ritual presence]. Through these public expressions, ethnic belonging extends beyond the internal sphere of the community and becomes visible within the wider social environment. In this way, ritual practises not only reinforce communal ties but also contribute to the public visibility of the diaspora.

Thus, diasporic religious space emerges as a multi-layered construct, where physical location, social relations, and sacred meanings are intertwined into a unified system. Rather than being a mere static structure, it constitutes a dynamic process through which the transnational or deterritorialised community materialises its presence and ensures the continuity of its identity within new spatial conditions (Jaworsky; Levitt 2007: 134).

Conclusion

The theoretical examination conducted in this article demonstrates that the analysis of ethnic and religious spaces in diasporic contexts requires moving beyond a static conception of space as a mere physical container. By synthesizing paradigms from the social production of space and spatial anthropology, the following conceptual conclusions emerge.

Diasporic ethnic space constitutes a dynamic social construct sustained by the ongoing reproduction of symbolic boundaries. Drawing on the theoretical frameworks of Barth (1969), Brubaker (2005), and Soja (1996), space is understood as an “eventful” reality activated through communal mobilization and symbolic practises. This process enables the deterritorialised (transnational) community to delineate parameters of belonging and preserve group autonomy within the social landscape of the host society.

Diasporic religious space operates as a central mechanism for ontological security and “sacred emplacement” within the community. The methodological approaches developed by Knott (2005) and Vásquez (2011) demonstrate that religious institutions function as spatial nodes where material environments and sacred meanings are integrated with diasporic *habitus*. Through such spaces, the diaspora materialises its presence, converting abstract spiritual affiliations into tangible, lived realities.

Building on classical approaches to the sacred and profane, diasporic religious spatiality can be interpreted through the lenses of Eliade (1963) and Durkheim (1912/1995). Eliade conceptualizes sacred space as a *hierophany* that interrupts the homogeneity of profane space, establishing a fixed point of orientation and a threshold to transcendent reality. Durkheim, in turn, views the sacred as a product of collective effervescence that reinforces social solidarity and moral boundaries. In the diasporic context, religious spaces thus serve to re-sacralize fragmented existence, providing a stable symbolic framework that counters the disorienting effects of displacement and migration.

Diasporic spatiality, understood as a product of the Lefebvrian “Production of space” (Lefebvre 1991), manifests as a hybrid “Thirdspace” in Soja’s sense (Soja 1996). It forms a domain where collective memory of the homeland intersects with local social experiences. The convergence of ethnic and religious dimensions generates a stable landscape for identity reproduction, thereby mitigating the spatial uncertainty engendered by migration.

Bakalian’s and Panossian’s analyses, in turn, reveal that ethnic space in the Armenian Diaspora is a dynamic social process, constantly reconstructed through community institutions and individual practises. Bakalian’s transition “from being to feeling Armenian” (1993) is particularly evident in the Armenian-American community: for early generations, ethnic space (churches, neighbourhoods) was essential for social survival, while later generations transform it into a symbolic space—where identity is reaffirmed selectively, for instance, through participation in Armenian church feasts, cultural festivals, or events, without a permanent lifestyle commitment. Panossian (2006) adds depth by framing this space as a materialised fragment of the “imagined community” using religious and educational institutions to forge transnational unity and overcome geographical distance from the homeland. Thus, diasporic spatiality emerges as an active, evolving project for sustaining stable yet adaptive anchors of Armenian identity in a foreign environment.

Further analysis confirms that ethnic space in the Armenian Diaspora is not a static territory, but a dynamic social process continually reconstructed through institutions, symbolic participation, and collective memory. This perspective highlights how diasporic communities transform space into a framework of belonging that preserves identity across generations while adapting to new social conditions. In this sense, diasporic spatiality emerges as an evolving project that sustains historical continuity and transnational connections.

In summary, diasporic ethnic and religious spaces function as active instruments of the community’s spatial self-determination. Far from merely preserving or transforming historical identity, these spaces actively construct a new socio-spatial reality that ensures organisational cohesion and continuity for the diasporic community under novel geographical conditions.

Our future research should integrate these theoretical insights with empirical case studies of diasporic communities in order to test the applicability of spatial paradigms across diverse migration contexts and to deepen our understanding of religion, identity, and place-making under transnational conditions.

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Fig. 1. The Armenian Genocide memorial in Athens is located in the Nea Smyrni municipality. It features a traditional Armenian zangak (bell/belfry) monument.



Fig. 2. Cathedral of St. Gregory the Illuminator (Sourp Krikor Lusavorich) Athens, Greece



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Mary Three-Handed in Bulgaria: Orthodox Piety and Local devotion

Abstract: Local cults—expressions of universal piety anchored to a specific place and its history—remain among the most enduring forms through which religion manifests in the contemporary world. Despite profound shifts in the sociocultural landscape of the postmodern era, these localized devotional complexes continue to shape believers' lives, drawing pilgrims in search of an immediate encounter with the sacred and the promise of miracles. This study examines the veneration of the Virgin Mary Three-Handed in Bulgaria by focusing on the principal local cults centered at three monasteries from the Stara Planina region: those of Troyan, Arbanasi, and Sokolski—all dedicated to the Dormition of the Theotokos. From a diachronic perspective, I examine their origins as distinctive reproductions of a prestigious prototype, drawing on both historical evidence and local foundation legends. Focusing on the contemporary landscape, I utilize fieldwork conducted between 2019 and 2025 to explore the constitutive elements of each local cult: sacred images, sanctuaries, festive days, rituals and invented practices, consecrated items and relics, and miracle narratives. A comparative analysis of these three cases reveals both shared devotional patterns and site-specific expressions, offering fresh insights into the dynamics of local devotion in modern Orthodox Christianity.

This study thus contributes to broader debates on lived religion by demonstrating that the global and the local are mutually constitutive: Orthodox tradition provides shared frameworks, while communities give them distinctive shape and sustained vitality. The universal tenets of Orthodoxy emerge not as monolithic dogma but as a living mosaic of local voices and practices.

Keywords: *Three-handed Mary, Bulgaria, Local devotion, Troyan monastery, Arbanasi monastery, Sokolski monastery*

Introduction

This article examines, through specific case studies and a comparative framework, the concept of local devotion (local cult) of a saint or relic, a concept I have developed and applied in my previous work (see Baeva 2012; Baeva 2013a; Baeva 2013b; Baeva 2014; Baeva 2017; Baeva 2019; Baeva 2020). The notion of a local cult rests on a distinction between two levels of religious life: the universal and the local¹. The universal level comprises the overarching religious doctrine—here, Orthodox Christianity—with its liturgical calendar, ritual

¹ This idea was articulated and elaborated by William Christian in his study of medieval Spain (see Christian 1981).

practices, sacred texts, and the pantheon of officially canonized saints. When this universal religiosity is instantiated in a particular place and community, it interacts with local traditions, folkloric images, and cultural models, acquiring distinctive local characteristics and forms. This interaction produces a specific variant of general religiosity that can be termed *local religion* (Christian 1981; Valchinova 1999), *local religiosity*, or *local religious culture* (Georgieva 2012). One of the most salient expressions of local religiosity is *local devotion*, understood as a particular manifestation of religion that is tied to a specific settlement or region, and deeply anchored in its unique cultural landscape, history, and traditions.

Recent studies of various concrete cases indicate that local cults remain remarkably resilient and vibrant today. They frequently become emblematic of their communities and serve as markers of collective identity. These locally specific forms of veneration constitute a significant dimension of religious life among the Orthodox majority in contemporary Bulgaria (see, e.g., Valchinova 1999; Baeva 2012; Georgieva 2012; Baeva 2013a; Baeva 2013b; Periklieva 2014; Gergova, Y. 2015).

In practice, a local cult is not a fixed, once-and-for-all institution but a dynamic process that develops over time as the consequence of multiple forms of interaction. It may be understood as the result of the activities of diverse social actors who, according to context, engage in relations of tension, negotiation, or exchange: clergy, monastic fraternities, state and municipal authorities, local communities, lay religious organizations, charismatic leaders, the media, and even scholars. Local cults are responsive to political, socio-economic, technological, and cultural processes and are continually transformed by changes in the environments in which they exist.

Conversely, my observations of diverse cases indicate that, despite their particularities and ongoing transformations, local cults share a common structural pattern that remains resilient over time. This enables us to interpret the local cult as a cultural text, consistent with the view that religious manifestations may be analyzed as cultural phenomena.² From this standpoint, the local cult can be examined by identifying its constituent elements and the relationships between them. Core components of the local-cult system include: the unifying figure of a *patron saint* or, less commonly, a *relic* (for example, the Holy Cross or the Virgin's belt); a *sacred place* (monastery, church, chapel) that serves as the cult's center; and *sacred time*, typically an emblematic feast or feasts—most often the saint's patronal celebration. *Miraculous objects* play a pivotal role in the site's appeal: holy relics and, especially, miraculous icons are central to Orthodox devotional life, and certain nearby *natural features* (healing springs, other water sources, rocks, trees)

² This perspective is set out by Clifford Geertz's foundational work on religion as a cultural system (Geertz 1973).

are also treated as miraculous. Linked to these places, feasts, and objects are specific *beliefs and ideas*, and a variety of *rituals*. Some of these rituals are part of established ecclesiastical practice, others are folkloric, and many reflect a blending or negotiated compromise between the two. *Visual representations* within churches (icons, murals) can illustrate and reinforce the dominant narrative of a site's sacred history. The *verbal narrative*—local and personal accounts in oral or written form—occupy a central position, since they explain, legitimize, and disseminate the cult and its constitutive elements. A comprehensive documentation and analysis of a local cult therefore requires attention to all elements of this system and to the interactions that bind them.

Using that systematic cultural approach, I examine here three concrete cases of devotion to the Three-Handed *Theotokos* (*Sveta Bogoroditsa Troeruchitsa*) in Bulgaria, associated with three monasteries: those of Troyan, Arbanasi, and Sokolski Monastery. All three shrines lie in the central Stara Planina region and are dedicated to the Dormition of the Theotokos, observed by the Bulgarian Orthodox Church on 15 August—the principal feast within the Marian cycle. The ethnographic description of these cases is based on personal fieldwork carried out between 2019 and 2025, employing observation and participant observation as well as semi-structured and open interviews.³ The study also draws on media and online publications, popular literature, and existing scholarly studies to outline the constitutive elements in the system of each local cult and analyze the relationships between them. Owing to limitations of space, this article does not attempt to survey the entire corpus

³ I visited the Troyan Monastery in July and August 2019, August 2020, September 2021, and July 2023. I observed and documented the feast of Theotokos Three-Handed on 11–12 July 2019 and the monastery's patronal feast of the Dormition of the Theotokos on 14–15 August 2019. My visits to the Arbanasi monastery took place in August 2019, August 2020, and September 2021, and I observed and documented the patronal feast of the Dormition on 14–15 August 2020. The Sokolski monastery near Gabrovo was visited in July and October 2019, and on 15 August 2025 when I observed and documented the celebration of the Dormition.

Part of the collected fieldwork material has been deposited at the National Centre for Intangible Cultural Heritage at the Institute of Ethnology and Folklore Studies with Ethnographic Museum, Bulgarian Academy of Sciences as follows:

Photographic documentation from the Troyan Monastery, 11–12 July 2019, 654 photographs, archival number FtAIF No. 1846.

Photographic documentation from the Sokolski Monastery, 13 July 2019 and 10 October 2019, 168 photographs, archival number FtAIF No. 1848.

Photographic documentation from the Arbanasi Monastery, 13–14 August 2019, 107 photographs, archival number FtAIF No. 1849.

Photographic documentation from the Troyan Monastery 14–15 August 2019, 432 photographs, archival number FtAIF No. 1847.

Video documentation from the Troyan Monastery 14–15 August 2019, 40 minutes, archival number PV1251.

Thus far, the rest of the fieldwork materials (audio recordings, photographs, and field notes) are preserved in my personal research archive.

of narratives linked to the three shrines and the miracle-working Troeruchitsa icons; it is limited to the core legends of origin that underpin the local cult.

The Three-Handed Theotokos: Iconographic Type and Original Prototype

Among the diverse iconographic types of the Theotokos in the Orthodox tradition, the striking and somewhat enigmatic image of the Three-Handed—the Mother of God depicted with three hands—is particularly notable. While several aspects of its origin still remain unclear, recent scholarship permits a general reconstruction of its history. Veneration of the Three-Handed Virgin appears to have originated in the twelfth to thirteenth centuries in Skopje, where a church and a monastery dedicated to the Three-Handed Theotokos once stood. Roughly two centuries later, the miraculous icon was transferred to the Hilandar Monastery on Mount Athos. The cult migrated with the icon and became firmly established at Hilandar, which emerged as the principal center of devotion to the Three-Handed Theotokos and an emblematic locus for Serbian historical and spiritual identity. Meanwhile, between 1725 and 1745, the original icon was replaced: instead of the initial image with three natural hands from Skopje, a new image of the Hodegetria Dexiokratousa type (turned to the right) appeared, to which an additional votive hand had been affixed. Art historians date this “new” Three-Handed icon to the mid-fourteenth century. It was originally a processional (litany) icon and was subsequently “reworked” by the addition of the Virgin’s third palm to become Troeruchitsa (see Đurić 1995; Miljković 2006–2007; Gergova, I. 2018; Gergova I. 2022: 16–33 and cited literature).

An important element of the cult of the Three-Handed Theotokos is the narrative of its miraculous origin. According to the most widespread legend, this event dates to the iconoclastic period in the eighth century⁴ and involves the figure of St. John of Damascus. St. John experienced a miraculous healing of his severed hand after fervent prayers before his household icon of the Virgin. In gratitude for the miracle, he commissioned a silver votive hand and affixed it to the icon, thereby transforming it into Three-Handed (Chudotvorni ikoni 2006)⁵. After the miracle, John retired to the monastery of St. Sabbas the Sanctified near Jerusalem, taking the miraculous icon with him. The icon remained in the monastery after his death. In the thirteenth century, the Serbian archbishop and saint Sava visited the monastery on pilgrimage, received the icon from the brotherhood in accordance with an old prophecy, and took it back with him (Chudotvorni ikoni 2006: 52–54).

Different versions exist regarding the later destiny of the icon (see summa-

⁴ A substantial discrepancy exists between the icon’s dating and the legend of its origin, which corroborates the hypothesis that the original icon was replaced.

⁵ For an analysis of this narrative, see Lepakhin 2020.

ry in Benchev 1996 and cited literature). In the most widely circulated variants, preserved to the present day, the icon is said to have miraculously appeared at Hilandar in the fourteenth or fifteenth century. These narratives report that the icon was located in Serbia when unrest (or the Ottoman incursions) occurred. In order to be saved from extinction, it was placed on a mule/donkey, which, by miraculous guidance, reached Mount Athos. At the Virgin's command, it halted before the Hilandar Monastery. The monks received the sacred image with solemnity and enshrined it in the altar of the catholicon. In commemoration of the miracle, they erected a small chapel beside the road at the spot where the mule was found. The narrative further asserts that the Hilandar monks continue to perform an annual litany procession to the site of the icon's apparition (Chudotvorni ikoni 2006)⁶.

The icon of the Three-Handed Mother of God has its own patronal feast, which is celebrated at Hilandar on 25 July (according to the Julian calendar, followed by the Serbian Orthodox Church) with an all-night solemn vigil.

The Troyan Monastery of the Dormition of the Theotokos— Main Centre of Devotion to the Three-Handed in Bulgaria

Consistent with Orthodox devotional practice, the miraculous prototype of the Three-Handed icon was reproduced in numerous replicas⁷ that circulated among Orthodox communities, particularly within the Slavic world, including the Bulgarian lands. In Bulgaria, the cult was transmitted directly under the influence of Hilandar, with which Bulgarian believers maintained intensive, long-standing connections. Scholars date the establishment of the devotion to the Three-Handed Virgin in Bulgaria to the eighteenth-nineteenth centuries. The image appears across media—in prints, goldsmithing, manuscript ornamentation, mural painting, and, most prominently, in icons (Gergova, I. 2011; Gergova, I. 2022: 33–107). While some of these representations remained privately held for domestic devotion or enjoyed only limited popularity within parish churches, others acquired broad recognition and a reputation for wonderworking, around which distinct local cults emerged.

The devotion to the Three-Handed Theotokos in Bulgaria has an undisput-

⁶ My review of online sources pertaining to the monastery, supplemented by indirect contacts on Mount Athos, indicates that this custom is no longer observed today. The sole analogous litany I have been able to register takes place on Epiphany and involves a copy of the Three-Handed Theotokos rather than the original icon, the latter remaining inaccessible for processional use because of its heavy *riza* (metal cover). The copy is borne in a solemn procession to a spring near the monastery, where the Great Blessing of the Waters is celebrated— <<https://www.facebook.com/profile/100063661418673/search/?q=бoгoявљeнe>> [Accessed 01.05.2026].

⁷ I examine and analyse this tendency of reproduction, which I term as multiplication of the sacred prototype, in a previous publication (Baeva 2025).

ed centre at the Troyan Stavropegial Monastery⁸ of the Dormition of the Theotokos. It is the third-largest monastery in the country after Rila and Bachkovo and is regarded as the most important and most visited pilgrimage centre of northern Bulgaria. The holy site lies in the immediate vicinity of the small Balkan village of Oreshak and 10 km from the town of Troyan in the Central Balkan Mountains. There is insufficient data for its early history. It is supposed that the cloister existed already in the Middle Ages, but most researchers accept that it was founded around 1600, basing this on information from its chronicle, which, unfortunately, was lost at the beginning of the twentieth century⁹. According to the legend recorded in this source, the monastery was founded by an unknown hermit and his attendant, who initially built a wooden hut in the “Troyan wilderness” and later on, a small church dedicated to the Nativity of the Theotokos.

The natural centre of the monastery complex is the main church of the Dormition of the Theotokos, erected in 1835 and decorated in 1847 with extensive mural cycles by the distinguished Bulgarian painter Zahari Zograf.¹⁰ The principal wonderworking object of the shrine, drawing pilgrims from near and far is the miraculous icon of the Three-Handed Virgin of Troyan. Measuring 132 × 91 cm, the icon is mounted on an elaborately carved *proskynetarion* (icon stand) at the right side of the nave. The central depiction largely follows the Hilandar Three-Handed prototype with minor modifications and is encircled by supplementary images forming a pictorial frame. Silver coverings with crowns adorn the halos of the Virgin and the Christ Child; coverings are also placed over the Virgin’s palms, and a third silver hand is added at the bottom of the image. Thus, as with its Hilandar model, the Troyan wonderworking icon was originally executed as an Hodegetria and later transformed into Three-Handed through the addition of a votive third hand. On stylistic grounds and according to documentary evidence, the icon is dated to the early nineteenth century; its probable author is Simeon Tsonyuv, an early member of the Vitanovtsi dynasty of hereditary icon painters from the town of Tryavna (Gergova, I. 2012: 156–157). Given the local legend that an icon was brought from Athos to Troyan in the early seventeenth century, it is plausible that an earlier Troyan Three-Handed icon once existed and was lost during the raids and plundering of that era. An alternative hypothesis is that the present icon is palimpsestic, having been overpainted and containing multiple pictorial layers.¹¹

⁸ Stavropegial monastery—which is directly subordinate to the Patriarch or the Holy Synod, rather than to the local metropolitan.

⁹ Editions of the text of the chronicle, see in Bakalov 1895; Danov 1903; Mutafovich 1931; Hariton 1958.

¹⁰ For studies on the history, architecture, and ecclesiastical artworks of the Troyan Monastery, consult Prashkov 1992a; Hariton 1958; Gergova, I. 1988. For an account of its contemporary condition, see Baeva 2020.

¹¹ Such statement was made by Bishop Sioniy Velichki, abbot of the Troyan Monastery until June 2025, in an interview from 11 July 2019.

A small chapel (also referred to here as *proskynetarion*), situated on a slight rise near the monastery in the direction of Oreshak, occupies a significant position in the complex's sacred geography. Local tradition identifies this spot as the scene of the first miracle attributed to the Troyan Three-Handed icon; in commemoration of that event an annual litany procession is conducted from the monastery to the holy place.

Like their Hilandar counterparts, the monks of the Troyan Monastery celebrate the feast of the miraculous icon of the Three-Handed Theotokos, but here it is on 12 July (according to the Gregorian calendar observed by the Bulgarian Orthodox Church). This practice is relatively recent: it was introduced only in 2015 at the initiative of the then abbot, Father Sioniy. A central element of the festive programme is the all-night vigil, which begins on the eve of the feast and continues until morning. In the past, the vigil was held on the eve of the monastery's patronal feast on 15 August, but around 1965 this tradition was discontinued. It has since been revived and attached to a new date: partly to mark specifically the feast of the Three-Handed icon and partly because of the busy schedule during the monastery's patronal celebration.¹²

Although recent, the feast has quickly gained popularity, chiefly through contemporary communication technologies, and attracts both local believers and visitors from the region. The service begins at approximately 20:30 and continues without interruption until 06:00 the following morning. The vigil is presided over by the abbot, Father Sioniy, and is served with the participation of other senior clerics. Priests from various towns also participate, as well as church choirs, travelling specifically for the occasion.¹³

In addition to the regular solemn liturgy, my 2019 field observations recorded an emergent practice that has recently gained currency in Bulgaria: the preparation of *kolivo*—a ritual dish of boiled wheat augmented with sugar, cinnamon, raisins, and other ingredients. Within Bulgarian custom, *kolivo* is traditionally distributed on *zadushnitsi* (memorial days) in remembrance of deceased kin, the underlying belief being that the departed will “receive” the offering in the afterlife. Additionally, the wheat grains symbolise the promise of new life after death (see Genchev 1985: 198). In the present case, however, the practice have been adopted from Athonite monastic tradition, where *kolivo* is prepared not only for the dead but also for patronal feasts, likely functioning as a votive offering to the saint who protects the monastery. Recently, Athonite practice has further evolved to include the decoration of *kolivo* with intricate representations of the patron saint executed in cinnamon and coloured sugar.¹⁴

¹² According to information from an interview with Bishop Sioniy.

¹³ Based on personal fieldwork conducted in 2019. See also Mihaylov 2019; <<https://bg-patriarshia.bg/news/praznikat-na-chudotvornata-ikona-troeruchitsa-v-troyanskia-m>> [Accessed 02.02.2026].

¹⁴ See <https://dveri.bg/component/com_content/Itemid,100724/catid,19/id,18832/view,article> [Accessed 24.02.2026].

Following the Athonite model, a group of women who are regular pilgrims to the monastery began preparing such kolivo under the direction of Nevena – a devout young woman and theology student. Because she could not paint like the monks, she had previously commissioned from a confectionery firm a small sugar-fondant reproduction of the miraculous icon, which the women placed on the sugar-sprinkled kolivo and surrounded with a frame of fondant flowers, sugar sticks, and beads. Toward the end of the service, the decorated kolivo was solemnly carried into the church and placed in front of the wonderworking icon, then blessed by the priests and distributed to the faithful “for health” in specially prepared plastic cups.

The monastery’s principal patronal festival, the Dormition of the Virgin (15 August), is observed with particular solemnity. Although this feast is shared by several major Bulgarian monasteries, it has been customary for the late Bulgarian Patriarch Neofit to travel to Troyan Monastery on this occasion to preside over the celebratory liturgy.¹⁵ The event regularly attracts representatives of the political elite and local authorities; notably, Boyko Borisov attended the feast in 2018 while serving as Prime Minister. Local practice also includes the opening of a traditional crafts fair on the day of the Dormition, which draws master artisans from across the country to exhibit their goods along both sides of the road linking the village of Oreshak with the monastery. The fair is accompanied by numerous itinerant traders, amusements, and temporary pavilions offering grilled food, beer, and other refreshments.

The church ritual begins on the evening of 14 August with the vespers service. At the end of vespers, a so-called *kuvukliya* (a stand for the *plashtanitsa*—*epitaphios*) is placed in the centre of the church, upon which an epitaphios depicting the Dormition of the Virgin is laid, decorated with white and red carnation petals. At the close of the service, the faithful venerate and kiss the epitaphios. There is also a practice of taking some of the petals, which are believed to confer healing. In the recent years, a richly decorated kolivo is prepared and distributed, similar to that on the Troeruchitsa feast, but bearing the image of the Dormition.

On the feast day itself, the service begins early in the morning, after which the epitaphios of the Theotokos is carried out and a procession with it is made around the church. This is followed by the festive Divine Liturgy, which lasts about two hours, while the monastery courtyard fills with pilgrims¹⁶. A long queue typically forms in front of the church of those waiting to buy candles. To one side there is another line of people patiently awaiting their turn to venerate the wonderworking icon. Arriving before it, they bow, some kiss and touch the icon while whispering their prayers. Offerings are also left: oil, wine, clothing, and sweets.

¹⁵ Despite his advanced age and frail health, he participated in the feast for the last time in 2019.

¹⁶ Based on information provided by the monastery administration and media reports, the feast attracts several thousand visitors each year.

At about 11:00, the feast reaches its climax—the litany procession bearing the wonderworking icon to the chapel that marks the site of its first miracle. The procession evidently follows the model established at Hilandar, although that ritual has already lapsed there. The tradition of such processions in Troyan is long-standing, as attested by images on prints from the early nineteenth century, and its popularity endures to the present day. The icon is removed from the proskynetarion and placed on a special bier decorated with flowers; it is then carried outside and the procession sets off. Leading the procession is a monk with a clapper, followed by men carrying banners, the icon-bearers with the miraculous image, the clergy, and numerous lay participants. It is believed that the icon's miraculous power is especially strong at this moment, so the crowd strives to reach for it; some attendees lift their children so they may touch the holy image. People at the market stalls greet the sacred object and venerate it, and many photograph it with their phones—the ubiquitous, newly formed “ritual” of the contemporary person.

The procession reaches the hill with the chapel, where the icon is placed on the designated spot. After a short service, a blessing of water is performed, and then the priest sprinkles the believers for health. Worshippers take some of the holy water home—again with the belief that it brings health and blessing. For the same reason, the flowers from the decoration, being “consecrated” by their contact with the sacred image, are quickly taken away. After several hours, the icon is carried back by hand to its place in the church and veneration before it continues until the evening, when episcopal vespers are served and the akathist to the Dormition is read.¹⁷

As noted, the narrative concerning the founding of Troyan Monastery and the appearance of the wonderworking icon of the Three-Handed Theotokos was recorded relatively late, around the beginning of the nineteenth century, in the monastery chronicle. With slight variations it continues to circulate to the present day, the “official” version having been published on the monastery's website and presented in a popular-science film produced at the behest of the monastery administration for screening in a special cinema hall intended for pilgrims and tourists.

A monk from Mount Athos on his way to Wallachia passed through these lands. He was carrying a miraculous icon of the Theotokos, a gift for his relatives in Wallachia. Intrigued by the news that a pious hermit and his disciple had recently taken up residence in the Troyan mountains, the Athonite stopped to visit them, and they spent a considerable time together engaged in ascetic practices. People from near and far came to venerate the holy icon, which performed numerous miracles in the Troyan district. For many years

¹⁷ For a detailed account of the celebration, see at: <<https://bg-patriarshia.bg/news/litiya-s-chu-dotvornata-ikona-sv-bogoroditsa-troeruchitsa-ot>> [Accessed 01.03.2026].

after his visit the Athonite monk was spoken of in laudatory terms. When the time came for him to continue his journey to Wallachia, he mounted his horse, made the sign of the cross, and set off. But before he had left the courtyard, the horse stumbled and fell. The cleric perceived this as a divine sign, postponed his journey, and returned with the icon to the hermit. After some time, he set out again, but at the same place his horse fell once more. He then understood that this occurred because the icon did not wish to leave that place. The hermit urged him to remain so that they might serve God together, as—it seemed—God also willed. But the traveler from Mount Athos longed for quieter regions, far from Turkish arbitrariness. With a deep bow and tears of devotion he took leave of the icon and departed alone, God in his heart. The Trojan hermit soon attracted several more brethren, who built a small wooden church for the wonderworking icon of the Theotokos and began to serve there. The number of pilgrims and settlers increased; cells and a guest-house were erected for them. Thus, the Trojan Monastery came into being.¹⁸

Although the cited tradition may contain traces of real historical events (see Gergova 2012: 153–155), it exhibits typical characteristics of an etiological narrative about the initial miracle, understood as a sacral precedent—a supernatural intervention through which the cult object comes into being.¹⁹ As is customary for this type of texts, the Trojan tradition employs familiar folkloric *topoi*—established, recurring motifs from the corpus of so-called monastic folklore and from traditional culture at large. Through these *topoi*, the sacred history of the local cult is legitimized, as is miraculous efficacy attributed to its chief emblems: the icon and the monastery that emerged around it. One such topos is obviously the role of the horse, by which the wonderworking icon manifested its will to stay in the Trojan vicinity. The figure of the “Trojan horse” clearly corresponds to the donkey (mule) motif found in the Hilandar legend, wherein the animal miraculously conveys the sacred image to the monastery gates and subsequently falls and dies.²⁰ Consequently, the Trojan Troeruchitsa functions as a replica of the Hilandar icon and the annual procession at Trojan reproduces the Hilandar pattern. Furthermore, by means of this analogous etiological narrative the Trojan monastery is affirmed as a symbolical duplicate of the Hilandar shrine—a relationship that endows it with heightened status and an attributed capacity for wonderworking.

¹⁸ <<https://www.trojanmonastery.com/ikonata-sv-bogoroditsa-triraka/>> [Accessed: 01.02.2026]. I recorded a closely related oral version in an interview with Father Sioniy.

¹⁹ For a more detailed account of the functions and specificity of this narrative type, based on concrete examples, see my monographs Baeva 2012; Baeva 2001/2013. See also the analyses offered by Georgieva 2012.

²⁰ This similarity has already been noted in the scholarship: see Gergova, I. 2012: 153; Bakalova 2016: 99. Bulgarian art-historian Ivanka Gergova also adduces a parallel with a similar legend concerning the relics of St. Dimitar of Basarbovo near the town of Ruse in Northern Bulgaria.

In recent years, the Trojan wonderworking icon has also gained popularity as an object of intercession in the *treatment of infertility*—another domain in which divine intervention is traditionally invoked. In my impression, this relatively new “specialization” has been established chiefly at the initiative of the monastery administration. Similar accounts have begun to appear in a number of media publications. This initiative is also expressed in the monastery’s partnership with the “I Want a Baby” foundation—a well-known Bulgarian NGO that aims to assist couples with reproductive problems and to raise public awareness of issues related to fertility and reproductive health. As a result of this cooperation, since 2015 a special *moleben* (public prayer) for childbearing has been celebrated before the wonderworking icon of the Troeruchitsa at Trojan Monastery, attracting an increasing number of participants from across the country. The most recent such ritual took place in March 2025.²¹

Arbanasi Monastery of the Dormition of the Theotokos and the “Weeping” Troeruchitsa

The historic village of Arbanasi, protected as an architectural-museum reserve, is situated approximately 5 km northeast of the medieval Bulgarian capital Veliko Tarnovo and roughly 100 km east of Trojan. *The Monastery of the Dormition of the Theotokos* occupies the village’s north-western quarter. Documentary evidence for the monastery’s foundation is scant; nevertheless, local tradition places its origin in the time of the Second Bulgarian Empire. Some sources link this event to the honourable figure of Patriarch Evtimiy²², while others associate it with the Bulgarian queen Irina, a descendant of the Asen dynasty and the wife of Tsar Konstantin Asen.²³

A preserved donation inscription indicates that circa 1688 a church dedicated to the Dormition of the Theotokos was built (or restored). It initially functioned as a parish church, and shortly thereafter a chapel of the Holy Trinity was appended to its northern side. The murals in the naos and narthex date to the late seventeenth and early eighteenth centuries.²⁴ In 1716, the hieromonk Daniel of Trojan found refuge in the church; other brethren gathered around him, marking the inception of a renewed monastic community. At the end of the eighteenth century, the foundation was plundered and destroyed by Muslim brigands, and it was rebuilt in 1836. After the earthquake of 1913, the monastery ceased to exist and the surviving church resumed

²¹ According to interviews with Father Sioniy and his deputy Father Stefan. See also <http://iskambebe.bg/index.php?route=layout/event&path=61&event_id=34> [Accessed 01.03.2026]; <http://iskambebe.bg/index.php?route=layout/event&event_id=101> [Accessed 01.03.2026]; Hristov 2019; Todorov 2025.

²² See the official website of the village of Arbanasi: <<https://arbanassi.org/Manastir-Sveta-Bogoroditsa-Arbanasi/index.html>> [Accessed 14.02.2025].

²³ According to a printed account hung in the church narthex.

²⁴ For further information on the church and its fresco decoration, see Gergova 1999; Ikonomova 2010.

parish status. In 1945, the site was re-established as a women's convent—a status it retains to this day (see Prashkov 1992b; Prashkov, Temelski, Gergova, Korzh 2009).

The church's main sacred object, *the wonderworking icon of the Three-Handed Theotokos of Arbanasi*, is dated to the 1780s–1790s and is attributed to the Tryavna icon-painting school. Notably, the icon is not of the *Hodegetria/Troeruchitsa* type but follows a completely different model: the Virgin is depicted en face on a throne, holding the Child on her lap, and she is surrounded by a frame with the twelve prophets. Above her head, two angels are painted holding a long scroll with an inscription in Greek and Bulgarian that reads: “Rejoice, O Unfading Flower”—an element borrowed from another iconographic type, the Theotokos Unfading Flower.²⁵ The image is considered to follow a Romanian prototype—the wonderworking icon from the Sarindar monastery in the centre of Bucharest, which no longer exists. The original icon from that monastery has been lost, but it is known from several preserved prints. Since a Romanian icon-painter worked in Arbanasi, Ivanka Gergova suggests that he may have brought a print of the Bucharest wonderworking icon and recounted its miracles to the locals, who subsequently commissioned a Tryavna painter to execute an icon for the church based on the print (cf. Gergova, I. 2012: 167). Four silver coverings are affixed to the icon: the halos of the Virgin and the Child, and two votive hands of the Virgin. Both of these are right hands, one larger and one smaller, placed one beneath the other. Three of the coverings bear donor inscriptions: on the halo of Jesus is written “Lazar and Kinka Kuyumdzhievi”; on the upper, larger votive hand “Andonchu and Sika [Siika?] Kuyumdzhievi”; and on the lower, smaller hand “T. S. 1928.”

With the addition of the two votive palms, the Virgin's hands became three, which led the local people to accept and venerate her as a Troeruchitsa, although her iconography is entirely different from the Hilandar and Troyan prototypes. This raises the pertinent question of how an image of a completely different iconographic type was transformed in this way. The existing literature offers no answer, but during my fieldwork I encountered a narrative that preserves the memory of the event that turned the Arbanasi icon into Three-Handed. According to one of the nuns, who had heard the story from older sisters, the third Virgin's hand was donated in 1928 in commemoration of a miracle attributed to the icon: the healing of a seriously ill child from a nearby town:

And then, in 1928, they brought a child from Gorna Oryahovitsa by cart who was already dying. He was choking, completely blue. Even when they laid him here, in front of the icon, on the ground, he was no longer breathing. And he came back to life! His relatives placed the small hand on the Mother of God, and from that moment she became Troeruchitsa.²⁶

²⁵ For a detailed description of the icon, consult Gergova 2012: 163.

²⁶ Interview with Sister Siluania, senior nun at Arbanasi Monastery of the Dormition of the Theotokos from 13 September 2021.

This oral testimony is supported by the donor inscription “T. S. 1928”. It is plausible to infer that beyond the particular event, the icon’s transformation into Three-Handed took place under the cultural and religious influence of the nearby Troyan Monastery, to whose ecclesiastical and social orbit Arbanasi belonged. The Troyan Troeruchitsa appears to have served as a familiar and prestigious exemplar for both the convent community and the local populace. The addition of a third votive hand effectively aligned the Arbanasi image with this renowned prototype, thereby augmenting its prestige and symbolic value. This process of adapting an existing icon to conform to a more prestigious model is not unique, having in mind that the Hilandar Three-Handed Theotokos likewise originated through the modification of an earlier processional Hodegetria.

At present, the icon is placed on an elaborately decorated proskynetarion in the church natrex, directly opposite the entrance. It is draped with curtains and covered with glass. Worshippers pray before it, bow to it, touch and kiss it, and leave offerings. In the past, there was a *ritual practice* of affixing coins to the image: if a coin remained attached, it was taken as a sign that the prayer would be heard (Papazov 1937: 51). My field observations, however, indicate that this practice has been abandoned today—probably because the glass covering prevents coins from sticking. An interesting ritual practice connected with the icon’s votive offerings has also been recorded. According to the local physician Dr. Dimitar Papazov, votives with various forms (hands, feet, eyes, whole little figures) were kept beside the icon and given to the sick with the corresponding ailments to wear during their stay at the monastery.²⁷ The same author also reports about the treatment of people with mental illness, who were confined in special cells fitted with iron grilles in the monastery (Papazov 1937: 51).²⁸ In contemporary practice, these measures are no longer maintained. Alternatively, the icon is believed to be particularly efficacious for *reproductive problems*, which draws many women and married couples, especially during the monastery’s patronal feast.

The monastery’s *patronal festival* begins on the eve of the Dormition of the Theotokos, on 14 August. Groups of pilgrims, sometimes entire families mainly from northern Bulgaria, spend the night in the monastery’s guest rooms, bring animals or foodstuffs for the *kurban* ritual meal, and take part in its preparation. The wonderworking icon of the Troeruchitsa is decorated with a wreath of flowers and brought out in front of the church, where it is placed on a special table to the left of the entrance for veneration. A queue quickly forms before it as people wait to venerate the icon and present their offerings. At 18:00 the evening service begins; it includes a circuit of the church with banners, but

²⁷ Although rare, similar practices are also found at other Orthodox holy sites—see Gergova, I. 2012: 163–164 and the works cited there.

²⁸ A number of scholars have examined ritual practices within the Orthodox church directed toward the treatment of persons with mental illness. See, for example, Valchinova 2005; Lubanska 2016; Gergova, I. 2018.

the icon itself does not take part. The priest performs *petohlebie* (*artoklasia*)²⁹, blessing loaves of bread, wine, and oil together with other foods brought by the faithful (seasonal fruits such as grapes, figs, plums, water melons, as well as sweets, olives, fish, and so on). Finally, the priest breaks the loaves, and the faithful distribute among themselves the foods brought, and take the remainder home for the festive table. This ritual represents a preserved traditional practice of blessing in the church of the first gathered fruits, which are then distributed “for health”.³⁰ The blessing of the first fruits, preserved to the present day, points to the connection between the Orthodox Christian calendar and the annual cycle of agricultural activities in the traditional Bulgarian village.

On the eve of the patronal feast, the church remains open and those who wish may *spend the night there*—“for health” and, above all, in hope to obtain a child.³¹ During my visit on 14 August 2020, shortly before midnight, there were about fifteen women of various ages in the church and two couples, who had probably come specifically to pray for conception. They had settled in the church nartex around the wonderworking icon of the Three-Handed Mother of God, and some had prepared mats and blankets to sleep. The women conducted something like their own service: they read the Akathist to the Theotokos and sang religious songs. At around midnight the lamps were extinguished and the door closed. It turned out that precisely at 00:00 a recently introduced practice took place—a ritualized wish-making, performed in the conviction that the desire thus formulated will be granted.

On 15 August, attendance reaches its peak. Devotees engage in customary ritual practices: lighting candles, submitting names for blessings, paying homage to the icon, and presenting offerings. The liturgical observance opens with the rite of the *maslosvet* (consecration of oil), during which a range of foods (oil, wine, bread, flour, confections, fruits, and roasted fish) are blessed. The faithful are anointed with chrism and the festive Divine Liturgy is served. The ceremony typically attracts civic dignitaries such as the regional governor and the mayor of Veliko Tarnovo. Concurrently, a *kurban* prepared from lambs donated to the monastery is cooked and distributed to attendees after the service. Concurrently, market stalls are established along the alley to the monastery gates, offering a diverse array of

²⁹ *Petohlebie* (Greek, *artoklasia*)—a rite in the Orthodox Church in which five loaves, wine, and oil are blessed and distributed for the health of the faithful (Rechnik). For the history and symbolism of the rite see Alexandrov.

³⁰ See Vasileva 1985: 131. According to some Orthodox sources, the blessing of the fruits is also performed on the Feast of the Transfiguration, 6 August (Schmemman 2010; Ivanova 2013).

³¹ The incubation (ritual sleeping inside a shrine or a cave) is traditionally practiced in the Balkans, mostly in monastery churches, which are believed to possess special powers due to their miracle-working icons or relics. I have observed the practice in the Bachkovo Monastery (no longer preserved nowadays because of the all-night service) and in a number of parish churches such as those of the Annunciation and the Golden Apple in Asenovgrad and St. Anthony in Melnik, as well as in the St. Zane chapel near Melnik (Baeva 2012; Baeva 2013a). For similar Greco-Roman incubation practices, see Le Goff 1985.

merchandise, from icons and religious souvenirs to toys, jewellery, food products, and other wares. As 15 August also functions as Arbanasi's local holiday, the village subsequently stages a programme of cultural and sporting events.³²

According to the monastery foundation legend³³, the icon of the Three-Handed Theotokos of Arbanasi was created during the Second Bulgarian Empire—an evident anachronism given that it is dated to the late eighteenth century. The Virgin appeared in a dream to a monk-iconographer from Mount Athos, instructing him to paint her image and bring it to a monastery dedicated to her near the town of Tarnovo. The monk obeyed and, upon arriving in Tarnovo, donated the icon to the Arbanasi monastery which at that time was the only one in the region dedicated to the Mother of God. The icon soon manifested its miracle-working power, curing the child of a wealthy merchant, who in gratitude presented the monastery with another Marian icon. After the Ottoman conquest of the region, the icon was buried in the ground or concealed within a ruined wall of the monastery in order to preserve it. For a long time, the site lay deserted. Only on the Feast of the Dormition did local people gather there to observe the holiday, until the icon itself gave a sign of its presence:

A shepherd boy was grazing animals on the meadows around the church when he heard the voice of a mother lamenting her child. The voice came from beneath the ground by the church wall. The boy called his masters—pious Christians—who dug up the earth and discovered a treasure: the miracle-working icon of the Mother of God.

The church was restored in 1680.

The first miracle concerns a Turkish boy who was deaf and mute. The Christians told his mother: “Go to the Holy Mother of God, for she does not look at a person's face or status; she looks at the heart.” There, before the icon, the child spoke for the first time and said, “The candles are burning.” Later, the icon also healed the child of the Tarnovo pasha, who donated money for monastic cells. The monastery's new wing now stands on that site. Our Heavenly Queen – St. Theotokos of Tarnovo, affectionately called by the people the “Weeping Troeruchitsa” – aids all who approach her miracle-working icon.³⁴

³² For an account of the 2025 festivities, see, for example <<https://boliarinews.bg/2025/08/15/стоици-миряни-от-страната-и-чужбина-с/>> [Accessed 02.02. 2026].

³³ A version of the story was published in 1934 by the local writer and journalist Zvezdelin Tsonev (Tsonev 1934: 21–22). Today an account of the icon's history is printed and displayed in the church narthex. Outside, a special device has been installed that plays an audio recording of the narrative in various languages. As is common in the present day, the tradition is also reproduced in a number of internet sources – see, for example, <<https://www.regnews.net/news/15342529738453/predanieto-za-chudotvornata-ikona-sv-bogoroditsa-troeruchitsa-v-arbanasi>> [Accessed 14.02.2026]. The legend is still preserved in oral transmission and local people recount it, albeit in an abridged form.

³⁴ The passage is taken from the printed narrative displayed in the narthex.

Because the icon revealed its presence to the faithful by means of weeping, it is also called the “Weeping Troeruchitsa”. Similar to the account from Troyan, the legend concerning the discovery of the miracle-working icon of the Virgin from Arbanasi again relies on familiar narrative topoi. One such topos is the bringing of the icon by an Athonite monk, which also appears in the Troyan tradition. Through this motif, the origin of the newly founded closter is traced to Mount Athos, thereby equating the new monastery with a prestigious and elevated model. Central to the narrative is the episode in which the icon, buried in the ground, is revealed by a miracle—a means of legitimizing the sacred power of the image and the sanctuary associated with it, a well-known plot reversal in the narrative tradition.³⁵

Sokolski Monastery of the Dormition of the Theotokos, and the Cave of the Falcon

Sokolski Monastery of the Dormition of the Theotokos is located in a mountainous area called *Sokola* (the Falcon) or *Sokolska peshtera* (the Falcon’s Cave), from which the monastery takes its name. It is also known as Gabrovo or Gabrovo-Sokolski, as inscribed above the entrance arch to the monastery courtyard. The convent lies 12 km southeast of the town of Gabrovo, 80 km from Troyan, and 60 km from Arbanasi. This is the most recent of the three monasteries in the country housing miracle-working icons of the Troeruchitsa. It was founded in the autumn of 1832, when Archimandrite Iosif, with secular name Ivan Markov (1786–1879), settled here. Afterwards, he adopted the surname Sokolski from the name of the locality and the monastery.³⁶

Iosif Sokolski, together with his companion, the hieromonk Agapiy, were former monks of the Troyan Monastery who decided to found a new convent at the small cave above Iosif’s native town of Gabrovo, where Iosif’s father had once lived in seclusion. Some authors suggest that a medieval rock monastery with cells hewn into the cliff may once have existed on the site (Prashkov, Boyadzhiev 1992: 94). Initially, the two monks settled in the cave and built a primitive wooden hut. A little later, they also erected a wooden church whose altar they carved into the rock. These events are specifically recorded in the monastery chronicle that Iosif began to write—unfortunately destroyed by fire in 1926 (Temelski 2004: 19). Today a commemorative plaque marks the site of the altar apse, and two tablets indicate the locations of the sacrificial table and the holy throne of the first church.

³⁵ For studies on the motif of the discovery of a buried icon in foundation legends of sacred places, consult Valchinova 1998 and Georgieva 2012: 97. Related narrative variants include accounts in which the image is hidden in a cave, as discussed by Baeva 2013, or concealed in a well, as noted in Chudotvorni ikoni 2006: 69–70.

³⁶ A dedicated study on the unusual life and career of Iosif Sokolski has been published (Temelski 2025).

The new church was erected and consecrated in 1834 with donations from the local inhabitants – mainly residents of Gabrovo and the neighbouring villages and hamlets. One of the first icons that Sokolski commissioned for it was the icon of the Three-Handed Theotokos. As scholars have noted, the archimandrite was clearly well acquainted with the history of the Troyan monastery and sought to reproduce it when creating the new foundation. Similar to the Troyan origin-legend, the founders were two monks who built a small wooden hut and a church, dedicated it to the Dormition of the Theotokos, and then commissioned a replica of the Troyan miracle-working icon, which once occasioned the foundation and enrichment of the Troyan monastery (see Gergova 2012: 88–89; Temelski 2004: 111–112, note 22). Thus, the newly built foundation was symbolically equated with the high sacred model represented by the Troyan Monastery as the centre of the cult of the Troeruchitsa in Bulgaria, thereby drawing on its symbolic capital to consolidate the new holy place.

Gradually, other monks gathered around the two founders, and thus the Sokolski Monastery came into being. After they raised sufficient funds, the new church was painted in 1862 by the icon painters Father Pavel from Shipka and his son Nikola, who included new images and subjects, atypical for the iconographic tradition (see Prashkov, Boyadzhiev 1992; Gergova, I. 2012: 89–91). Residential wings were also built, as well as rooms for pilgrims from various nearby settlements such as Bozhentsi, Shipka, Etara, Zeleno darvo, and others (Temelski 2004: 26–27). At present the monastery is a convent and houses two nuns.

The icon of the Troeruchitsa itself is dated to 1833 and is attributed to Ioanikiy Papa Vitanov—nephew and pupil of Simeon Tsonyuv, the painter who executed the Troyan wonder-working icon. This choice was likely deliberate and represents another aspect of Archimandrite Sokolski's sought continuity with the Troyan Monastery (Gergova, I. 2022: 52). The Troeruchitsa of the Sokolski monastery follows the Troyan model with minor modifications, but with greater realism in the depiction and with a “softness and humanity” (Gergova, I. 2022: 53) in the expressions and poses of the Virgin and the Child. At present, the miracle-working icon is not displayed for veneration but is kept in the monastery chapel for safety reasons. In the church, on a proskynetarion specially reserved for the purpose, there is a paper copy of it. According to the account of Sister Pelagia, the icon helps with the *conception of childless women* and with cures for various illnesses. Sometimes, those who have been healed come to give thanks, but she does not show curiosity about their stories.³⁷ According to my fieldwork observation, visitors pay homage to the icon, touch it, and offer gifts, especially on the monastery's patronal feast day. Although it is considered miracle-working, its popularity cannot, however, be compared to that of the Troyan and Arbanasi Three-Handed icons.

³⁷ Interview with Sister Pelagiya from 02.10. 2019.

It turns out that a large part of the *ritual activity* within the monastery's sacred space is actually concentrated not so much around the miracle-working icon as around a natural feature—the *cave* located immediately adjacent to the church. According to historical accounts, toward the end of the nineteenth and the beginning of the twentieth century this cave and the water that wept down its stalactites and stalagmites were the principal attraction for the faithful (see Temelski 2004: 35–36 and the literature cited there). This water was regarded as miracle-working and was used to treat eye diseases and various other ailments. In the cave, a built-in ceramic bowl has been preserved to this day. The water drops used to collect there so that worshippers could draw the healing water. In recent years, however, this water has dried up for most of the year and appears only in spring when there are abundant rains.³⁸

There are also preserved accounts of *traditional incubation* in the cave: pilgrims used to spend the night there on the eve of the Dormition feast (Temelski 2004: 36 and the literature cited there), but this practice has long been abandoned. At present, the entrances to the rock church and the cave are closed with iron grilles, so visitors have no access either to the interior of the cave or to the miracle-working water, if any remains. In its place, a new ritual has developed at the site—leaving of slips of paper with “wishes” and requests, which pilgrims throw into the cave through the grilles or tuck into fissures in the rock.³⁹ Alongside the “letters”, coins are left in the cave and on the stones, probably as symbolic offerings in the hope that the desired favour will be “purchased” by the divine powers. Given that the slips are periodically collected and disposed of by monastery staff, their number during my visits was considerable, which suggests that this practice is actively maintained today.

Based on my observations and information from interviews, the monastery's *patronal feast*, the *Dormition of the Theotokos*, does not feature any distinctive ritual elements. There is no litany procession or all-night vigil. According to interviewees, some people come who spend the night at the monastery on the eve of the feast, but not in the church—rather in the guest rooms. A solemn liturgy is celebrated, beginning at about 8 a.m., with one priest serving inside the church while another stands at the entrance and anoints those entering. After the service everyone goes outside and a water-blessing is performed. The priest sprinkles the believers and they have the opportunity to take some of the blessed water to carry home. Meanwhile, a *kurban* is prepared and distributed to the faithful on behalf of the monastery. During my visit in 2025 the ritual dish was fish soup, since the feast fell on a Friday, which in the Orthodox tradition is a fasting day, but in other years a lamb *kur-*

³⁸ According to the interview with Sister Pelagia and my personal observations.

³⁹ The practice of writing letters with requests is also encountered at other holy sites in the country, for example the Russian Church in Sofia, the cave of St John of Rila in the environs of the Rila Monastery, and the church of St George in the village of Zlatolist, Melnik region (see Grebenarova 2002; Bakalova, Lazarova 2009: 113; Baeva 2014a; Baeva 2014b).

ban is prepared. There was also boiled wheat—*kolivo*—offered as a personal votive, prepared by an elderly woman from Gabrovo, though without the kind of decoration I observed at the Troyan Monastery.

Unlike the usual pattern of local cults that arise around miracle-working icons, in this case there is no etiological legend of a foundational miracle. There is a *narrative* concerning the monastery's foundation, but it contains no miraculous elements and is rather anecdotal: by means of a ruse the monastery's founder, Iosif Sokolski, managed to obtain permission to build the new church. At that time the Ottoman authorities did not grant permits for the construction of new Christian churches, only for the restoration of existing, ruined ones. For this reason, Iosif and his companion smoked the cave with candles so that it would appear that services had long been held there. Iosif also made a stone icon of the Theotokos the Life-Giving Spring, which he placed inside. In this way, he succeeded in deceiving the local officials into believing that an old monastery had existed on the site and thus obtained permission to build.⁴⁰ The absence of an etiological narrative of a miracle attributed to the icon may help explain its relatively low popularity, the absence of distinctive ritual practices connected to it, and the limited regional influence of the Sokolski monastery.

Conclusions

The ethnographic description and analyses offered so far clearly demonstrate that the veneration of the Three-Handed Theotokos preserves its vitality and relevance in modernity. In Bulgaria, this devotion is embodied in three principal local cults linked to monasteries in the central Balkan Mountains: those of Troyan, Arbanasi and Sokolski monastery. However, the three shrines differ in the extent of their influence. As the principal Troeruchitsa centre housed in a large and prominent monastery, Troyan has expanded its reach and assumed a representative status for northern Bulgaria and, increasingly, for the nation. This is indicated by the size of the crowds at its patronal feast, the volume of media attention, and the visits by senior church and state officials. The Arbanasi monastery ranks second, drawing pilgrims primarily from the Veliko Tarnovo area and, more broadly, from northern Bulgaria. The Sokolski monastery's local cult exerts the most limited influence: it retains only modest regional importance as a religious centre, despite its popularity as a tourist destination.

In historical perspective, the emergence of these local cults follows the principle of multiplication: a prestigious, "high" prototype is deliberately reproduced, reworked, and disseminated, and through this process new local cults are generated. As the miraculous icon of the Three-Handed Theotokos is reproduced or adapted and transformed, the entire system of elements of the local cult are likewise replicated and localized. This multiplication is not mere imitation;

⁴⁰ The legend was fixed in a written source (Stoyanov 1939). During my fieldwork, a similar story was told by both of my interlocutors: Sister Pelagia and Father Hristo from Gabrovo, who was serving in the church on the day of my visit, 15 August 2025.

it is an active strategy of legitimation whereby monastic fraternities, administrative authorities and local communities “borrow” symbolic capital from a recognized center and re-anchor it in a new place.

Although the three Troeruchitsa cults share a common structural grammar—icon, sanctuary, feast, associated rituals and foundation narratives—each one exhibits distinctive emphases and idiosyncrasy that shape its unique profile. Viewed diachronically, local devotion could be compared to a living organism: it grows, differentiates, and adapts to changing social, ecological, and institutional conditions while preserving an enduring core structure. The cult to the Three-Handed Theotokos in the central Balkan Mountains of Bulgaria shows that religiosity is not a static category but a socio-cultural process during which the sacred is continuously replicated, adapted, and localized. This dynamic contributes to broader debates on lived religion by demonstrating that the global and the local are mutually constitutive: Orthodox tradition provides shared frameworks, while communities give them distinctive shape and sustained vitality. The universal tenets of Orthodoxy emerge not as monolithic dogma but as a living mosaic of local voices and practices.

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Fig. 1. Troyan Monastery of the Dormition of the Theotokos: view of the inner courtyard.
Photo: Vihra Baeva.



Fig. 2. Prayer before the miracle-working icon of the Three-Handed Theotokos of Troyan. 15 August 2019.
Photo: Vihra Baeva.

Fig. 3. Procession with the miracle-working icon of the Three-Handed Theotokos of Troyan.

15 August 2019.

Photo: Vihra Baeva.



Fig. 4. Entrance to the church of the Arbanasi Monastery of the Dormition of the Theotokos.

Photo: Vihra Baeva.

Fig. 5. Pilgrims spending the night inside the church of the Arbanasi Monastery on the eve of its patronal feast.

14 August 2020.

Photo: Vihra Baeva.





Fig. 6. View of the church of the Sokolski Monastery of the Dormition of the Theotokos, with the cave visible on the right. Photo: Vihra Baeva.



Fig. 7. The miracle-working icon of the Three-Handed Theotokos from the Sokolski Monastery of the Dormition of the Theotokos. Photo: Vihra Baeva.

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The Bulgarian Orthodox Church against Folk Traditions: The Nestinar Ritual in Strumyani and Parvomay as Invented Traditions¹

Abstract: This article analyzes the intensified negative attitude of the Bulgarian Orthodox Church (BOC) toward certain manifestations of Bulgarian folkloric tradition in a contemporary context. The study focuses on two specific cases: the fire-dancing rituals (*nestinarstvo*) in the villages of Strumyani and Parvomay (Blagoevgrad Province), which are also examined as examples of “invented tradition” in the sense defined by Eric Hobsbawm. The aim is to trace how the Church exercises institutional and symbolic control over public cultural practices.

The article argues that after the end of the schism in the BOC in 1998, a more distinct institutional consolidation of claims to control over the “purity” of Orthodox practice can be observed, leading to conflicts with local cultural traditions and to processes of clericalization affecting not only the clergy but also the laity. The analysis shows that the examined cases are not isolated but fit into broader processes of re/traditionalization and ideological reinterpretation of tradition in contemporary Bulgaria.

Keywords: *nestinarstvo, folkloric traditions, invented tradition, nestinar, re/traditionalization, control, Bulgarian Orthodox Church*

Toward the Formulation of the Problem

The role of the Bulgarian Orthodox Church (BOC) with respect to that part of Bulgarian society which defines itself as professing Orthodox Christianity cannot be outlined unambiguously. The difficulty stems from the specific nature of its institutional engagement: on the one hand, there is a lack of explicitly stated positions and real actions on socially sensitive moral and ethical issues such as care for the homeless, orphans, drug addicts, and the incurably ill; on the other hand, there are occasional expressions of opinion—without public debate—on issues concerning contemporary views on human rights, such as abortion,² gender, or the imposition of religious education within the Bulgarian educational system.

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² See the publications on leading Bulgarian Orthodox websites related to the Church’s categorically negative stance on abortions: “*Pravoslaven Svyat*,” “*Bogonosci*,” “*Dveri na Pravoslaviето*,” “*Pravoslaviето.BG*,” “*Pravoslavna Mladezh*,” “*Pravoslaven Hram*.” The links are provided in the cited literature.

At the same time, in recent years there has been a noticeable intensification of the negative attitude of the Bulgarian Orthodox Church toward manifestations of traditional practices with a festive or ritual character, whose basic folkloric nature clashes with the religious concepts of Orthodox Christianity.

The most recent incidental reaction of the BOC, which became the actual occasion for the present study, is the ban issued by the Sliven Metropolis in 2025, imposed on the priests and laity of the Sliven Diocese, prohibiting them from attending or participating in the nestinar ritual practices characteristic of the Strandzha region: “We oblige the entire priestly clergy and all Orthodox Christians not to be present at or participate in any way in nestinarstvo.”³ This prohibition by Metropolitan Arseniy was preceded by an appeal addressed in 2021 to the priests of the same diocese by his predecessor, Metropolitan Ioannikiy⁴: “Therefore, with the same spiritual authority entrusted to us by Christ, in connection with the sinful nestinar mysticism, we call upon you as follows: Honor God and sanctify His name, and do not replace Him with worship of the evil one.”⁵

A comparison of the two quotations, even without analyzing the full texts of the addresses by the two metropolitans, clearly shows a hardening of tone in the appeals to priests and laity and a replacement of the expected appeal-like rhetoric of the Church with imperative language. This fact raises suspicion of a latent process of clericalization. An argument in this direction is also provided by the fact that Metropolitan Arseniy’s ban was imposed not only on the priestly clergy but also on “all Orthodox Christians,” thus attempting to place the laity in a subordinate position that is not institutionally grounded. This means that the metropolitans claim control over institutionally unbound believers without there being real mechanisms for its enforcement. Such control would be possible only through a process of clericalization extending beyond the clergy and affecting the laity as well.

The aim of the present article is to analyze the contemporary manifestations of the attitude of the Bulgarian Orthodox Church toward local folkloric and ritual practices by tracing how this behavior fits into a longer legacy of tension between institutional Orthodoxy and traditional culture, including invented tradition, and to examine the thesis that a process of clericalization is taking place.

Achieving such a goal is possible through the examination of specific cases in which the Bulgarian Orthodox Church expresses a sanctioning attitude toward particular instances of Bulgarian folkloric tradition or practices related to it. In this regard, the article considers two cases of nestinar ritual practice

³ See Dveri na pravoslaviето. 2025. Slivenski mitropolit Arseniy za nestinarskite igri: Ili sme hristiyani, ili ezichni (2025, May 21) https://dveri.bg/component/com_content/Itemid,100723/catid,14/id,74207/view,article/

⁴ Ioannikiy of Sliven was the Metropolitan of the Sliven Metropolis until his death in 2024, after which Arseniy of Sliven was proclaimed Metropolitan of Sliven.

⁵ See Sv. sinod na Balgarskata pravoslavna tsarkva – Balgarska patriarshiya. 2021. Visokopreosveshtchenstvo Slivenskiya mitropolit Yoannikiy otnosno nestinarstvoto. <https://bg-patriarshia.bg/news/izyavlenie-na-negovo-visokopreosveshtenstvo-slivenskia-mitro>

in the villages of Strumyani and Parvomay (both in Blagoevgrad Province), in which the attitude of the Bulgarian Orthodox Church toward such manifestations clearly stands out.

What the two examined cases share is the initial absence of Christian churches⁶ in both villages, with such churches being built only after 1989, following the socio-political changes in Bulgaria.⁷ Another feature that brings the studied cases together is the fact that Saints Constantine and Helena were chosen as patrons of the churches in both villages, which predetermined the introduction of elements of nestinar ritual practice (for the connection between the cult of the two saints and nestinarstvo, see Arnaudov 1971) and its transformation into an invented tradition.

An additional aim of the present study is to answer the question of to what extent it can be argued that in both cases, the cultural phenomenon of “invented tradition,” as defined by Eric Hobsbawm, is observed: “‘Invented tradition’ is taken to mean a set of practices, normally governed by overtly or tacitly accepted rules and of a ritual or symbolic nature, which seek to inculcate certain values and norms of behaviour by repetition, which automatically implies continuity with the past” (Hobsbawm 1983: 2). In Hobsbawm’s formulation, several markers indicating that invented tradition is the result of a purposeful and ideologically bound process rather than a spontaneous idea clearly stand out: (1) the presence of a set of practices (2) conceived as connected with the past, without a real direct link actually existing, and (3) governed by rules of a ritual character, while (4) the existing practices are used to instill values and norms, i.e., they represent purposeful ideological activity.

Although Hobsbawm formally divides traditions that may be defined as invented into those whose emergence and rapid establishment are difficult to trace and others that are genuinely invented and constructed, what is essential in both cases is their existence as cultural constructs; that is, their creation is, above all, a process of invention (see Hobsbawm 1983: 1). Most decisive for the present choice of Hobsbawm’s concept is the sharing of his research interest regarding this type of “tradition”: “but it is their appearance and establishment rather than their chances of survival which are our primary concern” (ibid.: 1).

The methods used in the study are basic to ethnology: ethnographic interviews, preceded by clarifying conversations leading up to the interviews, and direct observation.

Fourteen ethnographic interviews were used for the analysis, with two of the respondents (one from Strumyani and one from Parvomay) being directly

⁶ The population in both villages is, without exception, identified as practicing Orthodox Christianity.

⁷ For the role of the village temple “as the center of the cultural geography of the community—place of prayer, but also of joint action, of collective memory and social affirmation” see Azmanova-Rudarska 2025: 86.

involved in the introduction of nestinar ritual practice in these villages. Some of the respondents from Parvomay explicitly requested to remain anonymous due to their concerns that they might become involved in unwanted conflicts with local representatives of the authorities and the Church.

Direct observation was conducted only once in Parvomay, whereas in Strumyani I carried out multiple observations, supported by an in-depth familiarity with related processes and public attitudes, since it is my native place. This methodological tool of the study plays an important role in the development of the main theses of the present article, as well as in shaping its conclusions, as it allows for achieving an analytical depth approaching that made possible by the method of participant observation.

The Two Cases of Nestinarstvo in Strumyani and Parvomay

First, it should be emphasized that in recent decades, an intensified two-fold interest in tradition has been observed on the part of village or urban communities, specific social groups, or prominent individuals who assume the role of both creators and users of the traditional. Researchers define this tendency as a process of re/traditionalization (Luleva 2020: 200). The impulses behind this increased interest in re/traditionalization can be found in “a turn toward the increasingly dominant conservative populism and ethnocultural nationalism occupying the public space” (ibid.).

Nestinarstvo in the Village of Strumyani

The beginning of nestinarstvo in Strumyani dates back to 2000—the first year of the first term of Mayor Valentin Chilikov—when the village church was still under construction. The construction of the church began in 1993, with its foundation marked by a blessing service performed by Pimen, the Metropolitan of Nevrokop himself. The church was completed in 2003 and consecrated by the successor of Metropolitan Pimen—the Nevrokop Metropolitan at that time, Nathanail. The patron saints of the church were chosen by Metropolitan Pimen, and according to former mayor Chilikov, there were two reasons for this choice. The first was that the Orthodox feast in honor of the Holy Equals-to-the-Apostles Constantine and Helena falls in the spring (21 May)—the time when the metropolitan effectively made his decision, which in this case was primarily a coincidence of circumstances. The other possible reason, pointed out by the same informant, was the relatively small number of churches in the Nevrokop Diocese dedicated to the two saints, toward whom there exists a strong ecclesiastical cult both in the region and across the country. In other words, the respondent assumes that this was a gesture intended to compensate for the very small number of feast days in the diocese honoring the two saints.⁸

⁸ Before the construction of the church in Strumyani, there were only three such churches. After its construction, the church in Strumyani became the fourth in the diocese. The Sts. Constantine and Helena chapel in the village of Parvomay, which is also part of this study, was complet-

As already noted, the initiative to include *nestinarstvo* in the celebration of the church feast of Strumyani belongs to the former municipal mayor, Valentin Chilikov (V. Ch.). Responding to my question regarding the authorship of the idea and its direct implementation, he was more than categorical: “Yes, (mine) absolutely, solely and entirely” (V. Ch.).⁹ The analysis of the interview reveals the motives behind the selection of *nestinarstvo* as a tradition to be introduced as an element in the celebration of Saints Constantine and Helena.

First of all, the respondent categorically emphasized his conviction that “*nestinarstvo* has nothing to do with Christianity” (V. Ch.), after which came the claim that “the church is Constantine and Helena and this (the church) is in direct connection with *nestinarstvo*” (V. Ch.). This was followed by the argument about the “rich cultural and historical heritage connected with the Thracians, whose main settlements are located on the territory of our municipality (Strumyani)” (V. Ch.), which is based on the ideologically widely exploited thesis during the socialist period that the Thracian tribe inhabited the lands along the Struma River (see *History of Bulgaria*, vol. I (BAS, 1979), section “Thracians”).¹⁰ The chain of causal relations was further supplemented by the assertion that “the *nestinar* ritual was characteristic everywhere where there were Thracians” (V. Ch.).

The complete logical construction used to justify the scientifically unproven presence of *nestinarstvo* in Southwestern Bulgaria can be schematically presented as follows: *nestinarstvo* is a Thracian ritual—this ritual was characteristic of all Thracians—Thracians of the Medi tribe lived here (prestigious because of the hypothesis that Spartacus came from this tribe)—therefore, *nestinarstvo* existed here.

The decision followed: “thinking in some way of giving the feast a sense of difference and uniqueness, we contacted some people who are hereditary *nestinari* [fire dancers]” (V. Ch.). Here two strategies become evident: the search for difference and uniqueness, and contact with hereditary *nestinari*, the latter aiming to achieve authenticity. Thus emerges the idea that the lost authentic tradi-

ed and consecrated in 2013—ten years after the consecration of the church in Strumyani—and is the fifth church in the Nevrokop Diocese dedicated to Sts. Constantine and Helena.

⁹ The ethnographic interviews used in this article are part of my personal archive, with the initials of the respondents indicated after each citation. At the request of some respondents, their initials have been changed.

¹⁰ This concerns a much broader development of an invented narrative, relating to the socialist era, when figures like the historical personality Spartacus were often used as symbols of class struggle and slave uprisings, without being supported by rigorous academic research. Above all, the idea of Spartacus’s origin from the Bulgarian lands is reflected primarily in history textbooks of that period and in propaganda materials. This is the reason why a monument to Spartacus was erected in the town of Sandanski—a tourism strategy that was effective for its time. Based on the widely accepted popular belief about Spartacus’s origin in the region, another case of an invented tradition can be observed in the village of Sklave (near Sandanski)—the “Slave Market” (see BNT 1 novini. 2017. Pazar za robi i gladiatorski bitki v sandanskoto selo Sklave, <https://bntnews.bg/bg/a/pazar-za-robi-i-gladiatorski-bitki-v-sandanskoto-selo-sklave>).

tion of *nestinarstvo*, characteristic of the Thracians who lived here in antiquity, has been restored again in modern times through hereditary *nestinari*. It should be noted that the Thracian argument has proven to be one of the most widely exploited in Bulgaria in cases where arguments are sought for the unshakable cultural validity of a given tradition or custom. It is precisely “deep antiquity” that serves as the guarantee of the desired legitimacy. This instrument is often applied to cases from folkloric culture, which is non-literate and therefore does not provide scientifically acceptable arguments in the form of written sources.

In contradiction of all arguments for the authenticity of the tradition of *nestinarstvo* in Strumyani are the in-depth studies of Mihail Arnaudov, conducted first in 1914 and later again in the early 1930s. Arnaudov’s conclusion, based on direct observations and investigations of the local history of the settlements where he recorded a *nestinar* tradition, was that these are influences and borrowings from the ritual tradition of the Greeks living in the Greek villages in Strandzha: “Almost all observers claim that *nestinarstvo* flourished especially among the Greeks, particularly those from Kosti; and all are convinced that precisely here its origin should be sought, and not among other Greeks along the Black Sea and not among the Bulgarians” (Arnaudov 1971: 52). A similar testimony regarding the introduced character of *nestinarstvo* is provided by Dimitar Marinov:

Therefore, here we encounter not a native folk rite, but a foreign belief, brought and preserved by several families alien to our nationality, but later naturalized. (...) And I base this conclusion on the information I gathered from the villages in the Burgas district, adjacent to the Lozensgrad villages, and from the very inhabitants of the villages—Stefanovo, Madzhura, Blatsa, Rezovo, Marzovo, Urgari, and Pirgoilo—from which there are now people resettled in the Burgas region. They told me: “This is not Bulgarian, but foreign, and the *nestinari* are only about ten families.” (Marinov 1914: 469).¹¹

The main question raised in this article regarding the examined case of *nestinarstvo* in Strumyani is the negative attitude of the Church toward it, expressed above all by the late Nevrokop Metropolitan Nathanail (d. 2013) and by some local priests. It should be emphasized that the generally negative attitude of the Orthodox Church toward *nestinarstvo* in Bulgaria is not new, and it was also documented by Mihail Arnaudov as early as the beginning of the twentieth century: “Bishops have visited this region and have forbidden the fire-dancing and the carrying of processional icons on the day of the church feast; priests have taken these icons from the hands of the entranced *nestinari* and have driven away from the church or from the fire those ready to dance” (Arnaudov 1971: 56). At the same time, Arnaudov emphasizes that local priests also assisted the *nestinari*:

¹¹ These examples, which testify to the introduction of the ritual in the Strandzha region and its subsequent interpretation as ancient, are indicative of the fundamentally fluid nature of what is generally understood as tradition.

And to the extent that the lower clergy did not find grounds to be indignant at the ideas and practice of the fire-dancers, considering that something entirely Christian was being performed here, that it concerned the ecstasy of the righteous and saints who, through their inspirations from St. Constantine and through their feat in the fire, place themselves above the very church hierarchy, this is shown by the fact that in more than one place it is precisely the village priests who lead the ceremonial procession to the sacred spring or the fiery threshing-floor. (Arnaudov 1971: 57).

In 2025, the negative attitude of the Bulgarian Orthodox Church toward *nestinarstvo* was renewed through the message of the Sliven Metropolitan Arseniy, addressed to the clergy and Orthodox Christians in his diocese, in which he categorically prohibited the participation of both clergy and laity in *nestinarstvo*: “We oblige the entire priestly clergy and all Orthodox Christians not to be present at or participate in any way in the *nestinar* ritual complex.”¹² The arguments proposed by Metropolitan Arseniy for imposing the ban are that walking on embers is a pagan custom, not an “authentic Bulgarian tradition,” that *nestinarstvo* is a “commercialized entertainment for bored tourists,” and that it has nothing to do with Orthodox mysticism.

It may be assumed that during the communist regime the Bulgarian Orthodox Church did not impose sanctions on manifestations of *nestinarstvo*, since during that period it functioned as an institution firmly controlled by the Bulgarian Communist Party (see Nushev 2012). The Church’s negative reactions to such manifestations intensified after 1998, when the schism in the Bulgarian Orthodox Church was brought to an end by the Pan-Orthodox Council¹³ held in Sofia on 30 September–1 October 1998. From this event arise at least two questions, fueled by the announcement of 5 October the same year on the official website of the Russian Orthodox Church entitled “Church schism in Bulgaria healed.”¹⁴

In the present article these questions are only outlined, as they require further and broader research. The first concerns the role of the Russian Church in resolving the schism in the Bulgarian Orthodox Church, and the second con-

¹² Link to the statement by the Metropolitan of Sliven on the “Doors of Orthodoxy” website: https://dveri.bg/component/com_content/Itemid,100723/catid,14/id,74207/view,article/. There is no officially published statement on the website of the Bulgarian Orthodox Church.

¹³ Although the council was designated by the Russian Church as “Pan-Orthodox,” it is not truly so, since not all the requirements for being recognized as “Pan-Orthodox” were met, namely: it must be convened with the participation of all canonical autocephalous churches; it must address issues of significance for the entire Orthodox world; its decisions must be adopted through a pan-Orthodox consensus; and subsequently recognized and accepted by the entire Orthodox Church (see *Organization and Working Procedure of the Holy and Great Council of the Orthodox Church*, Art. 1–2, Chambésy, 2016).

¹⁴ Russian Orthodox Church. 1998. Tsarkovniyat razkol v Balgariya e izlekuvan. [Църковният разкол в България е излекуван]. <https://old.mospat.ru/archive/en/1998/10/ne021081/> [Accessed 10 December 2025.]

cerns its subsequent role regarding control over the “purity” of Orthodox Christianity practiced in Bulgaria. An argument for the importance of these questions is the listing of the participants in the Pan-Orthodox Council in Sofia from the Russian Orthodox Church: Patriarch of Moscow and All Russia Alexy II, Metropolitan of Smolensk and Kaliningrad Kirill, and Archbishop of Kaluga and Borovsk Kliment, chairman and deputy chairman of the Department for External Church Relations of the Moscow Patriarchate, respectively.¹⁵

The question of the Church’s attitude toward nestinarstvo in Strumyani inevitably requires answers to how it is practiced, insofar as in its authentic forms in Strandzha it represents a ritual complex in which the nestinar dance is the leading component, but not the only one.

From the descriptions of the respondents, as well as on the basis of my own observations, nestinarstvo in Strumyani has become part of the village feast whose ideological center is the celebration of the patron saints of the church, Saints Constantine and Helena. The celebration has two manifestations: strictly religious—the service in the church (initially, while it was still under construction, in its courtyard), and secular—an organized mass festivity in the center of the village in front of the municipal building. Nestinarstvo is part of the secular manifestation and take place after sunset; priests do not participate in them, whereas in the authentic variant of the nestinar ritual complex in Strandzha, they lead the daytime processions to the sacred springs (“ayazmata”) to sprinkle the icons of St. Constantine and St. Helena with water, or after sunset accompany them on their way to the “circle of fire,” where the nestinari perform their dance.

As for the degree to which nestinarstvo has been adopted as part of the celebrations in Strumyani, two elements show that several years after their initial inclusion in the patronal feast of Sts. Constantine and Helena Church, they were already anticipated and the attending villagers had established habits. The first concerns the very beginning of the nestinarstvo, which is announced by the sound of a bagpipe accompanied by the beats of a drum, serving as a signal to the people gathered in the square. Everyone turns toward the musicians in anticipation of the appearance of the nestinari, who emerge from the nearby Youth House, where they had previously dressed in their traditional costumes. The two nestinari—a man and a woman—appear, dancing with the “tailed icons” (icons with attached posts) of St. Constantine and St. Helena, and lead the procession toward the nestinar fire, whose location is precisely fixed, unchanged over the years, and situated approximately 100 meters from the square in front of the municipal building. It is noticeable that the movement of the people is coordinated and without hesitation, i.e., it can be claimed that within a relatively short period it has acquired the character of a familiar and established tradition.

After arriving at the fire, the two nestinari stir it, spreading the embers

¹⁵ Link to the announcement on the official website of the Russian Orthodox Church: <https://old.mospat.ru/archive/en/1998/10/ne021081>

evenly. This is followed by the first dance around the circle of fire. This dance very much resembles an anticipation of being “possessed” by a saint, with everything taking place against the background of the sounds of the drum and the bagpipe. The introductory nestinar dance lasts approximately ten minutes, after which comes the dance in the embers, followed by repeated entries of the nestinari, who run through the fire in the shape of a cross, carrying above their heads the “tailed” icons of the saints. Then comes another dance of the nestinari, consisting of circling the fire with the icons in hand in rhythmic steps set by the drum and accompanied by shouts, according to nestinar tradition. The entire dance lasts about half an hour, after which the final component takes place – healing with fire.

While the nestinar dance is in progress, a line of people forms next to the fire, waiting to be carried across it by the nestinar. First are those with current health problems, and by common agreement priority is given to those whose condition is considered by the others to be the most severe. At this stage, the degree of belief of the sick and their relatives in the healing power of the nestinar dance becomes evident, as it testifies that what is happening is more than a tourist attraction or a staged performance. To some extent, the strength of this conviction is also confirmed by the fact that most respondents remember the first sick person in the village who sought help through the magical contact with the nestinari and the fire because of a very serious illness.¹⁶

After the sick have been carried across, it is the children’s turn; they are brought by their mothers and grandmothers. They too line up beside the fire to be carried across it “for health.” When the last child has been carried across, the nestinar performance ends. From my direct observations over different years, and even after the very first nestinarstvo, I gained the impression that the participating nestinari were well accepted and well known within the local community. People talked freely with them and, after the dance, invited them into their homes.

At present, nestinarstvo in the context of the feast of Saints Constantine and Helena no longer takes place. The removal of the nestinari from the feast was preceded by a long and multifaceted conflict between Nevrokop Metropolitan Nathanail and local priests, on the one hand, and the former municipal mayor Valentin Chilikov, on the other.

The beginning of the tension between the two institutions dates back to approximately 2004 when, in the words of V. Ch., “he somehow withdrew from many things that he had previously blessed, including the consecration of the museum.” Thus, one of the occasions for tension between the bishop and the mayor turned out to be the museum opening in Strumyani, whose exhibition included mainly ethnographic artifacts, but also items from Antiquity and the Middle Ages found in the municipality’s area, as well as icons and church utensils. The metropolitan disagreed with the display of the icons and other church

¹⁶ This was a woman with terminal cancer, brought by her relatives in the hope of being healed after being carried over the fire in the *nestinar* ritual.

objects in the museum and refused to consecrate the newly created museum: “And when I invited him to come and consecrate the museum, he said, I will not consecrate such things. These are devilish undertakings” (V. Ch.).¹⁷ This fact is symptomatic of the “hardening” of the Bulgarian Orthodox Church’s attitude toward manifestations that in some way contradict its basic doctrinal principles of professing the faith.

The reason for the termination of the more than two-decade-long tradition of *nestinarstvo* in Strumyani seemingly lies outside the context of the examined conflict. The decision of the local authorities was justified by the argument that the village feast of Saints Constantine and Helena (21 May) is too close in time to the municipal holiday, which is celebrated on 7 April. In order for the main emphasis to fall on the municipal holiday, the municipal leadership decided to reduce the celebration of the church and village feast to a *kurban* (a community meal in honor of a saint, on a church feast day, or in thanksgiving to God) dedicated to Saints Constantine and Helena. This required moving the place of celebration from the square in front of the municipal building to the courtyard of the church, and the time of its conduct was set from morning until noon. Thus, without significant tension, an end was put to the *nestinarstvo* in Strumyani. At the same time, according to the expressed opinion of some respondents, this was a joint move by the Church and the local authorities, through which the *nestinar* dances, as a pagan manifestation, were eliminated.

The second occasion for a clearly expressed negative attitude by representatives of the Bulgarian Orthodox Church concerns another case—the Festival of the Gods of Wine in Ilindentsi. Its beginning dates back to 1993, and the idea and script for its implementation belong to the then curator of the local community center (*chitalishte*), Dimitrina Vezenkova. The scenario, presented on the municipality’s website, speaks of a classic case of an invented tradition: “A solemn water-blessing is served for a rich harvest. This is followed by the appearance of the ancient deities of wine—the Thracian Zagreus, the Phrygian Sabazios, the Greek Dionysus, the Roman Bacchus, and the Christian Saint Tryphon—accompanied by a noisy retinue. With them walks the maiden Keratsa, named after the famous *keratsuda* [grape]. She is the universally acknowledged queen of wines. The deities perform the Thracian ritual ‘Rosalia,’ preserved from four thousand years ago.” What is curious in this case is that the inhabitants of the village define the Festival of the Gods of Wine as their own tradition, despite the clear memory of its beginning, which may be regarded as a typical example of the emergence and conceptualization of a practice as tradition within a relatively short period of time.

¹⁷ The museum’s church utensils that provoked the Metropolitan’s negative reaction ended up there due to the careless attitude of the Church representatives towards them. According to the testimony of the former municipal mayor, Valentin Chilikov, most of the objects were prepared by church officials for disposal or burning, and only chance and his quick intervention saved them.

The conflict between the mayor and the Nevrokop Metropolitan, rooted in the Wine Festival, first developed in the media sphere: “Publicly, in the media, we had disputes because he said these are pagan things; the Church has no place there” (V. Ch.). The Metropolitan’s negative attitude was expressed in a specific order prohibiting the priest of the church in Ilindentsi (priest-economos Georgi Saradinov) from performing the water-blessing. A ban on participation in the Festival of the Gods of Wine was also imposed on Father Vasil Kotev (now deceased), who was also from Ilindentsi but at that time served in the church of the village of Mikrevo (the largest village in Strumyani municipality).

Despite the negative reaction of the Metropolis, a priest was included in the Festival of the Gods of Wine so that the scenario’s intended unity of all wine deities, including the associated Christian Saint Tryphon, could take place. The obligatory solemn water-blessing for the festival was performed by the elderly Father Boris (serving in the village of Dobri Laki, Strumyani municipality), who did not comply with the orders of the Metropolis. The mayor described the priest’s participation as follows: “He was the only one who said, I have only one superior and he is in heaven. I am not interested in anyone else; I will come. The bishop cannot tell me anything” (V. Ch.). This was followed by a serious conflict between Metropolitan Nathanail and Chilikov.

According to the former mayor, there was no real reason for conflict with the Metropolis: “we are not doing anything that is against Christianity, but are trying, so to speak, within a one-hour theatrical performance to present the millennial history of this region related to viticulture and winemaking” (V. Ch.). His words show how the same manifestation can be conceived simultaneously as tradition and as a contemporary instrument for presenting an idea of belonging to an ancient culture.

Nestinarstvo in the Village of Parvomay

The case of the introduced nestinarstvo in the village of Parvomay has similarities, but also differences, with that in Strumyani. The similarity is determined by the fact that in both cases a church was first built whose patron saints are Saints Constantine and Helena, and by analogy with the authentic tradition from Strandzha, nestinarstvo was included in the celebrations honoring the two saints. On the other hand, there are two opinions among respondents regarding the question of who initiated the introduction of nestinarstvo in Parvomay.

The first opinion belongs to Ivaylo Popov, who claims authorship both for the construction of a church dedicated to Saints Constantine and Helena and for the inclusion of the nestinari in the celebrations. The view of this respondent completely contradicts the accounts of the other respondents from Parvomay, according to whom building the church was Georgi Trenev’s idea. It should be noted that both Ivaylo Popov and Georgi Trenev are politically and institutionally influential figures, both in the village of Parvomay and in the wider region.¹⁸

¹⁸ Ivaylo Popov is known in Parvomay for having bought all the former public buildings in

According to Ivaylo Popov, the idea of erecting a cross above the village and building a chapel was unequivocally his: “It was my idea to put a cross above the village” (I. P.). At a later stage, the respondent emphasized the expansion of the initiative, which took the form of a campaign to collect donations in the form of volunteer workdays. A total of 146 people joined the campaign, and the chapel was built within three months. Financial contributions were also made by 44 families from the village, as well as by the staffs of the kindergarten, the school, and the village cooperative. The respondent was adamant that he played a leading role in the practical implementation of the idea for building the chapel, explaining this by his strong public influence in the village and the region. It should be stressed that in the interview, Popov did not mention even once the name of his political associate Georgi Trennev, who, according to the other respondents, had a leading role in the decision to build the chapel.

According to Ivaylo Popov, the choice of the chapel’s patrons was made by the parish priest Georgi, who justified it with the claim that “Constantine discovered the Cross” (I. P.). The priest’s argument is a pseudo-truth and rather follows the logic of folk etymology, since, according to one of the Church Fathers, Rufinus of Aquileia, the credit for the discovery of the True Cross belongs to St. Helena (see Rufinus 2016: 378). In this sense, if a correspondence is sought between the erection of a cross above the village and the discovery of the True Cross, to be expressed in a feast, the most logical date would be 14 September, when the Feast of the Exaltation of the Holy Cross is celebrated. It is precisely this feast that commemorates the discovery of the True Cross by St. Helena.

A completely opposite account regarding the idea of building the chapel was provided by the other respondents, and the differences concern not only the authorship of the idea for erecting a cross above the village and building a chapel, but also the reason underlying the emergence of the idea, as well as the church’s attitude toward the participation of fire-dancers (*nestinaris*) in the feast day of the chapel.

According to all respondents from Parvomay, the idea of erecting a cross above the village, which later developed into the construction of a chapel, belongs to Georgi Trennev. The reason for his decision was the death of his son, who died at the age of twenty-one in a car accident together with his girlfriend. The two were to be married in about a month. The choice of the Equal-to-the-

the village and for having three consecutive unsuccessful mayoral campaigns. According to respondents, his failures are due to significant resistance from the local population, as the acquisition of the former public buildings is viewed very negatively. Georgi Trenchev is a former business partner of Ivaylo Popov, owns an accounting firm with exceptionally high potential, and his political activity includes a seven-year term as a municipal councilor from the GERB party in Petrich, five of those years as Chairman of the Municipal Council. Since June 2025, he has been the Chairman of the Supervisory Board of the National Hunting and Fishing Association. The high social status of both men is likely the reason why all other respondents from Parvomay explicitly insisted that their own names not be mentioned, even as initials, a request which will be respected.

Apostles Saints Constantine and Helena as patrons of the chapel was predetermined by the death of the two young people, that is, one saint for each of them: “although V.’s father never said it openly, people—we—know that it is in memory of V. and Il.” (S. A.). In other words, when choosing the patron saints, a correspondence was sought both in number and in gender: “And everyone goes to this feast because they know that Kostadin and Elena are in honor... and that is why Kostadin and Elena, because it is in memory of V. and Il.” (R. D.). The role of the father, Georgi Trenev, was presented as follows: “...it is a fact that to this day the place is maintained by Georgi Trenev. He is the person who goes up there, invests money, mows the grass” (N. Iv.), and here the appearance of a supernatural element (a miracle) after a fire is also mentioned: “But for two consecutive years the fire reached some of the first tables, because there are tables with benches there, and the chapel remained untouched” (N. Iv.).

The Church’s Attitude toward Nestinarstvo in Parvomay

First of all, it should be emphasized that this is an extremely large-scale event in terms of the number of visitors to the service and to the fire-dancing performances, which is evident from Ivaylo Popov’s words: “In fact, we prepare over 1,200 portions.¹⁹ Many people come, and these people are not only from Parvomay. They come from the municipality and the surrounding area.” As for the church’s attitude toward nestinarstvo in Parvomay, it is primarily expressed in the participation of the local priests in the ritual, and it is described most precisely by one of the respondents: “Our local priests used to come. They always sang on that day. Many ritual breads were distributed for health. Every year a kurban is distributed” (E. G.).

The difference from the cases of invented tradition in Strumyani and Ilindentsi is substantial and has two aspects. In Parvomay, not just one but several priests take part fully in the ritual. Secondly, there is a unity of the Christian ritual (the service dedicated to Saints Constantine and Helena) with the nestinar dance in terms of place and time, as logically the service precedes the dance, since traditionally the dance on the embers takes place after sunset.

In this case, as in Strumyani, the ritual action has developed into a belief in the healing contact with the fire-dancers and the fire, which is again confirmed by the respondents’ testimonies and refers primarily to the dance of the fire-dancer with the sick, and especially with children: “Everyone tried to give their little child. I have also given my child” (L. D.).

The second aspect of the Church’s attitude toward nestinarstvo in Parvomay is connected to the radical change in its assessment, primarily by the “new” archieratic vicar in Petrich, Archpriest Pavel Milushev. Although he was appointed to this post in 2019, replacing the “old” vicar Angel Kochev, in interviews with local people he is still referred to as “the new one,” which suggests

¹⁹ This indicates that the approximate number of visitors is around 1,200 people.

that he has not yet been accepted by the laity.²⁰ The reason for this lack of acceptance is that the “new” vicar was appointed by the Metropolis without taking into account the will of the laity in the Petrich region of the Nevrokop Diocese. The non-acceptance also manifested in open protests, such as on 3 March 2019, when parishioners stormed the Petrich church of St. Virgin Mary and interrupted the service led by the new archieratic vicar Pavel Milushev.

Archieratic Vicar Pavel Milushev’s attitude toward the ritual practices associated with the celebration of 21 May, the day of Saints Equal-to-the-Apostles Tsars Constantine and Helena, both the church aspect and *nestinarstvo*, is expressed through regulations analogous to the prohibition imposed by Sliven Metropolitan Arseniy forbidding priests to participate in *nestinar* rituals. Specifically, in 2025, the archieratic vicar forbade the participation of *nestinaris* in the celebration in Parvomay, as well as forbidding local priests from taking part in events involving *nestinaris*: “But there is a new one who has categorically forbidden them to come because they actually used to come. [...] Last year there were priests, there was a *kurban*. They came, they sang, and they knew that after that there would be *nestinaris*, and there was never a problem until this year. This year they said it’s not allowed, it can’t be done, it’s pagan, and that’s that” (L. D.). Thus, this year only the local priest participated in the service.

In explaining the change in attitude of the “new” archieratic vicar toward widely practiced local folk traditions, respondents shared several facts, emphasizing that he is a conduit of the will of the Nevrokop Metropolitan.

The first is the prohibition imposed by the archieratic vicar in Petrich on priests from the Petrich ecclesiastical district (including the local priest) to bless a *kurban* if it falls on one of the two fasting days of the week, i.e., Wednesday or Friday. One respondent commented: “In the past, this didn’t matter at all. I mean, they would come anyway. And many times it fell on a Friday. My father, as long as I remember, had a *kurban*, and many times it fell on a Friday. And my grandfather had one too. And there was never any problem” (E. G.). When one respondent asked the local priest in Parvomay to bless a *kurban* that he had been making for many years, he received a categorical refusal. The priest’s response, as recounted by the respondent, was, “...well, yes, but I can’t do anything else, because if he finds out, he will fire me” (E. G.).

The second fact concerns the increasingly negative attitude in recent years of some priests in the diocese, particularly in the Petrich ecclesiastical district, toward *kurbans* and the practice of choosing a patron saint. This tendency is confirmed by another respondent: “Because I had an incident like this. And I asked him to tell me which feast day I should make the *kurban* for, and he said, enough, stop. If you want, donate to the church. What are these *kurbans*?” (P. Hr.).

²⁰ In their responses, the respondents refer to the episcopal vicar as “*vladika*,” equating the metropolitan vicar with the Metropolitan of the Nevrokop Diocese, which is primarily due to a lack of knowledge of the hierarchy within the Bulgarian Orthodox Church.

The third specific example cited by respondents concerns the folk tradition of making a special bread on the fortieth day after a child's birth. This ritual is a folkloric accompaniment to the Christian practice of the "Clean Prayer," recited on the fortieth day after birth to allow the mother to "enter the church, participate in the service, and take communion." One respondent shared that when she asked what she should prepare regarding the bread for the fortieth day, she was told: "This isn't in the Bible anywhere, we've never done it. Where do you get these modern things? On the fortieth day, you come here, take communion, and that's it" (L. D.). In fact, this is not a new practice but an established folkloric tradition of making bread on the fortieth day for a newborn, which the Church attempts to limit by reducing the ritual solely to the "Clean Prayer."

Conclusion

The analysis of the cases examined shows that the negative attitude of the Bulgarian Orthodox Church toward certain folk practices is neither new nor accidental; rather, it fits into a longer historical tradition of tension between institutional Orthodoxy and local ritual cultures. Nevertheless, in the contemporary context after 1989, and especially after the resolution of the schism in the BOC in 1998, this attitude acquires a more clearly expressed institutional and normative character, manifested in attempts to centralize and strengthen control over both religious and para-religious rituals.

The cases from the villages of Strumyani and Parvomay demonstrate that the Church's intervention is not directed solely against folk practices whose content contradicts fundamental theological doctrines, but also against practices that are constructed or reactivated as "traditional" under conditions of social and cultural transformations. In this sense, the concept of "invented tradition" proves to be a productive analytical tool, allowing the tracing of processes of creation, legitimization, and contestation of ritual practices in a local context.

The research further shows that the change in the deontic modality of the Church's discourse—from advisory to imperative—leads to an expansion of claims to control beyond the clergy and onto the laity, which generates tension and resistance at the local level. Practices such as *nestinarstvo* or the preparation of ritual bread on the fortieth day after birth become symbolic fields of conflict between institutional religion and living traditional culture.

In conclusion, it can be argued that the cases examined should not be interpreted as isolated incidents but as part of broader processes of re/traditionalization, the ideological framing of tradition, and the redefinition of the role of religious institutions in the public sphere of contemporary Bulgaria. This opens the field for future research focused on transnational influences, mechanisms of institutional control, and the dynamics of relationships among religion, culture, and power.

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From State-Socialist Atheism to Orthodox Christian Nationalism: Re-enchantment, Tradition, and Constitutional Court Discourse in Bulgaria¹

Abstract: This article examines the reactivation of Orthodoxy and tradition as resources for the Orthodox nationalism that has gained momentum in Bulgaria in recent years. It analyses the discourse of this new Orthodox nationalism as articulated in Decision No. 15/2021 of the Bulgarian Constitutional Court and demonstrates how judicial interpretation transforms a symbolic constitutional reference to religion into a normative constitutional resource, thereby constitutionalizing Orthodox nationalism through the re-enchantment of constitutional discourse.

The article traces the transformation of constitutional discourse surrounding the interpretation of Article 13(3) of the Constitution, which provides that Eastern Orthodox Christianity is the traditional religion of Bulgaria. It argues that Orthodox nationalism in post-socialist Bulgaria is not merely an expression of religious revival but rather of a process of *re-enchantment* of constitutional discourse, in which Orthodox Christianity becomes sacralised as the moral and historical foundation of the Bulgarian nation and a legitimate source for interpreting the Constitution.

Keywords: *Orthodox Christian Nationalism, Re-enchantment, Tradition, Constitutional Court Discourse*

Introduction

Following the end of the Cold War, religion returned to the public sphere across the former socialist countries. It became part of a broader process of the re-enchantment of the world, which, released from the constraints of communist ideology and state control, manifested in a proliferation of religious, magical, healing, and other practices connecting individuals with the supernatural. Despite the extensive literature on postmodern re-enchantment (Taylor 2007), relatively little attention has been paid to the institutions and mechanisms through

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which religion and tradition are mobilized and transformed into resources for the new post-socialist Orthodox nationalism.

This article examines how Orthodox Christianity has re-emerged as a public religion (Casanova 1994), becoming a constitutional reference point for defining gender and gender relations and serving as a marker of national and civilizational identity in Decision No. 15/2021 of the Bulgarian Constitutional Court. It traces the transformation of constitutional discourse surrounding the interpretation of Article 13(3) of the Bulgarian Constitution, which stipulates that Eastern Orthodox Christianity is the traditional religion of Bulgaria. I argue that this transformation illustrates the changing place and semantic scope of the religious—specifically Eastern Orthodoxy—in the jurisprudence of the country's highest constitutional authority, as well as the mutually constitutive relationship between legal and political discourse concerning the role of Orthodoxy in public life and state governance.

The article advances the argument that Orthodox nationalism in post-socialist Bulgaria is not merely an expression of religious revival but rather of a process of the re-enchantment of constitutional interpretation, in which Orthodox Christianity becomes sacralised as the moral and historical foundation of the Bulgarian nation and as a legitimate interpretive resource for constitutional reasoning. Decision No. 15/2021 demonstrates that the Constitutional Court has functioned as a key institution in transforming the constitutional meaning of Article 13(3), thereby providing legal legitimacy to Orthodox Christian nationalism. In this sense, the Court emerges as an agent of the sacralisation of tradition and of the constitutional legitimization of religious nationalism.

Religious Nationalism

In 1993, Mark Juergensmeyer published *The New Cold War? Religious Nationalism Confronts the Secular State*. The central argument of the book is already encapsulated in its title: religious nationalist movements are on the rise worldwide. Juergensmeyer understands religious nationalism as an ideology that treats religion as the foundation of political and national identity and, consequently, as a challenge to the secular state. Drawing on examples such as Hindu nationalism in India, Islamic movements in the Middle East, Buddhist nationalism in Sri Lanka, and Christian nationalism in the United States, he argues that religious nationalism challenges the core principles of the secular state—state neutrality and the separation of religion and politics—because it regards secularism as both illegitimate and hostile. In Juergensmeyer's formulation, the secular state and religious nationalists are therefore engaged in a new Cold War.

What is the situation in Bulgaria?

Bulgaria is constitutionally a secular state, yet religious nationalism has been steadily gaining ground. Unlike Juergensmeyer's cases, however, religious nationalism in Bulgaria is not in conflict with the state. Before presenting my argument, I propose a broader definition of religious nationalism. I define reli-

gious nationalism as a political project seeking to return religion to the public domain by sacralising the nation-state as a collective religious subject whereby state authority and national identity are legitimized by a link to the divine (Tranfić 2025: 173; Sremac, Ganzevoort 2015). Within this framework, the majority religion is positioned as the foundation of national identity, while its moral norms, values, and symbols are incorporated into legislation, education, and both public and private life. The dominant religion increasingly shapes public policy, resulting in the religionization of politics, the marginalization of minority religious communities, and the division of society into those included in and those excluded from the religious national community (Friedland 2001; Triandafyllidou 2024).

Religious nationalism is therefore characterized by the fusion of religion and national identity, which are presented as inseparable and mutually constitutive, with the nation itself defined through its relationship to a particular religion (Brubaker 2012). It further entails the incorporation of religious morality into law and public policy as a key feature of the religionization of politics.

Roger Friedland argues that ethnoreligious nationalism represents a distinct political project and rhetorical framework that differs from, and even constitutes an alternative to, conventional nationalism. In ethnoreligious nationalist discourse, the state, territory, and culture are unified through a focus on family, gender, and sexuality. The traditional family is constructed as the primary site of social reproduction and moral socialization, while economic and cultural forces perceived to undermine its authority are portrayed as threats. Ethnoreligious nationalism seeks to counter these forces by preserving traditional gender roles, the gendered division of labour, and restrictive norms of sexuality, confining sexuality to the institution of the family (Friedland 2011).

During the period of state socialism in Bulgaria, the state's atheist policies resulted in a high degree of secularization. The Orthodox Church was subjected to political control and pushed out of public life (Lefterov 2020, 2021, 2022), while religious practices were largely confined to the private sphere. At the same time, the regime pursued a systematic policy of eradicating religious elements from traditional family and calendar rituals, although this objective was never fully achieved.

After 1989, as elsewhere in post-socialist Eastern Europe, religion experienced a remarkable revival in both private and public life. Numerous religious rituals were restored and reintroduced into the public sphere, while the public visibility of the Orthodox clergy increased significantly.² The rehabilitation of religion formed part of the broader policies of historical justice aimed at restoring the pre-socialist past and redressing the injustices inflicted by the communist regime, primarily through the rehabilitation of Christian values and the

² For an analysis of the process of clericalization and the Bulgarian Orthodox Church's increasingly negative attitude toward local folkloric traditions in recent years, see Bozhinov 2026 in this volume.

guarantee of freedom of religion. These policies were consistent with the liberal-democratic order and the civic, liberal nationalism to which Bulgarian society aspired after the end of communism.

Constitutional Discourse

During the first years of Bulgaria's post-socialist transition, a series of legislative reforms sought to dismantle the totalitarian state and establish a new democratic legal order based on the protection of civil rights, individual freedoms, private property, the abolition of the discriminatory measures associated with the so-called Revival Process, and the restoration of the rights of Bulgaria's Turkish minority.

Among these reforms was the Law Amending the 1971 Constitution, adopted in January and promulgated in April 1990.³ Article 53 of the 1971 Constitution⁴ originally provided:

Article 53. (1) Citizens shall be guaranteed freedom of conscience and religion. They may perform religious rites and conduct anti-religious propaganda. (2) The Church shall be separate from the State. (3) The legal status, financial support, internal organization, and self-government of religious communities shall be regulated by law. (4) The use of the Church and religion for political purposes, as well as the establishment of political organizations on a religious basis, shall be prohibited. (5) Religion may not serve as grounds for refusing to perform duties imposed by the Constitution or by law.

The 1990 constitutional amendment replaced the second sentence of Article 53(1) with the following provision: "Citizens may freely profess or adopt a religion of their choice, perform religious rites and rituals, and engage in either religious or atheist propaganda."

The amendment thus replaced the earlier wording—"They may perform religious rites and conduct anti-religious propaganda"—with a provision guaranteeing the freedom to profess or adopt a religion, perform religious rites and rituals, and engage in either religious or atheist propaganda.

In both versions, citizens were guaranteed the right to perform religious rituals. The difference lies in the treatment of propaganda: whereas the Zhivkov Constitution explicitly authorized only anti-religious propaganda, the 1990 amendment recognized both religious and atheist propaganda, thereby establishing formal neutrality between religious and non-religious worldviews. This constitutional amendment, which established a symmetry between religion and atheism in the constitutional order, marked the beginning of a gradual transformation of Bulgarian constitutionalism. Over the following decades, this evolu-

³ Available at: <https://www.parliament.bg/bg/19>. [Accessed 13 July 2026]

⁴ Available at: <https://www.parliament.bg/bg/36>. [Accessed 13 July 2026]

tion culminated in Constitutional Court Decision No. 15/2021, which disrupted that symmetry by elevating Orthodox Christianity from one of the constitutionally protected beliefs to a source of constitutive moral norms and a legitimate interpretive resource for constitutional adjudication. This development represents a shift from liberal de-secularization toward the normative privileging of Orthodox Christianity.

Thus, one of the first constitutional changes adopted after the removal of Todor Zhivkov from power signaled the new political leadership's break with the communist regime's anti-religious policies. Believers and atheists were granted equal rights to engage in public advocacy of their respective convictions. The amendment marked the end of the state's monopoly over atheistic ideology, which had been pursued with varying degrees of intensity throughout the socialist period. At the same time, many former communist leaders—previously committed to official atheism—began attending Orthodox churches during major Christian holidays, publicly demonstrating their affiliation with Orthodox Christianity.

Religion was further rehabilitated in the 1991 Constitution. Article 13, which regulates freedom of religion, largely reproduced the principles contained in the previous constitution, particularly in paragraphs (1), (2), and (4):

Article 13. (1) Religious denominations shall be free. (2) Religious institutions shall be separate from the State. (3) Eastern Orthodox Christianity shall be the traditional religion of the Republic of Bulgaria. (4) Religious communities and institutions, as well as religious beliefs, shall not be used for political purposes.

The principal controversy during the debates in the Grand National Assembly concerned Article 13(3). Unlike the other provisions, it accorded a special status to Eastern Orthodox Christianity by designating it the “traditional religion” of the Republic of Bulgaria. As participants in the constitutional debates—and later the Constitutional Court itself (Decision No. 10/2003)—emphasized, this provision was intended to have symbolic rather than legal significance.

How did this formulation emerge?

The draft constitution was prepared by the Constitutional Commission, chaired by Ginyo Ganev, which submitted a compromise text for debate and approval in the Grand National Assembly. Three distinct positions emerged regarding Article 13(3). Deputies seeking to restore historical continuity with the pre-communist constitutional order recognized that the wording of the Tarnovo Constitution could not simply be reinstated. Article 37 of the Tarnovo Constitution, repealed by the 1947 Constitution, had declared that “the dominant faith (*Господствующата вяра*) in the Principality of Bulgaria is the Orthodox Christian faith of the Eastern confession.” Equally unacceptable were proposals

to designate Eastern Orthodoxy as the “official” or “state” religion, since there was broad agreement that Bulgaria should remain a secular state and that no religious denomination should enjoy legal privilege over others.

At the same time, many deputies believed that the Constitution should acknowledge the historical contribution of Eastern Orthodoxy to the Bulgarian National Revival and to the preservation of Bulgarian national identity. Representatives of the liberal wing of the Union of Democratic Forces (UDF) and the Movement for Rights and Freedoms (MRF) argued that paragraph (3) should be removed altogether, maintaining that any explicit reference to Eastern Orthodoxy would inevitably place it in a privileged position, whereas a secular state should maintain equal distance from all religious denominations.

The compromise eventually adopted described Eastern Orthodox Christianity as the “traditional religion” of Bulgaria. Nevertheless, debates continued in the plenary session of the Grand National Assembly.⁵ The central issue remained how to reconcile the constitutional principle of state secularism with explicit recognition of the historical significance of the Bulgarian Orthodox Church.

Several deputies accepted the compromise wording while seeking to reinforce it through additional arguments emphasizing Orthodoxy’s role in Bulgarian history. Petar Obretenov argued:

At first glance this appears to be merely a declaration that imposes no obligations on either legislation or the state. In practice, however, this is not the case. We have already adopted legislation declaring Christmas and Easter official public holidays. This demonstrates that Eastern Orthodoxy is indeed the traditional religion of the Bulgarian people. We cannot return to the Tarnovo Constitution’s formulation that Orthodoxy is the dominant religion, but we must acknowledge this historical fact, which has profoundly shaped our national psychology. It already has normative implications and will continue to have normative implications.

Other deputies proposed even stronger formulations. Petar Taslakov suggested replacing “traditional religion” with “historical and national religion,” while Dimitar Ezekiev argued that Eastern Orthodoxy should be recognized as the “foundation of Bulgaria’s national culture.” This proposal was challenged by Professor Iliya Konev, who pointed to the important contribution of Bulgarian Catholic intellectuals to the National Revival. Petar Beron likewise rejected the formulation “foundation of national culture,” arguing that it would exclude many other traditions and communities that had also contributed to the development of Bulgarian national culture.

⁵ Available at: https://parliament.bg/pub/StenD/2013040104075112061991_149.pdf. [Accessed 13 July 2026]

Nationalist arguments also surfaced during the plenary debates. One of the clearest examples was the intervention of Father Lyubomir Popov. He argued that Christmas and Easter had been declared official public holidays according to the Orthodox liturgical calendar and that this, in itself, constituted recognition of Orthodoxy as Bulgaria's traditional religion:

The character of a nation is determined by its language, its culture, and its religion. Throughout its historical existence, the Bulgarian people have been inseparably linked to Eastern Orthodox Christianity, its culture, and its spiritual tradition... The fact that other ethnic groups live in this country does not oblige us to adopt their language; likewise, the existence of other religious communities does not compel us to regard their culture and religious traditions as defining the identity of our nation.

Rumen Vodenicharov similarly defended Article 13(3) as an expression of constitutional tolerance:

We could have written, "Eastern Orthodoxy—not Islam—is the traditional religion." We could have adopted the wording of the Greek Constitution and declared Eastern Orthodoxy the "dominant religion," but we did not. Instead, we speak of a "traditional religion" because Christianity came to this sacred land before Islam and therefore represents a longer historical tradition.

By contrast, the deputy Metodi Nedyalkov proposed that Article 13 should include an explicit reference to the Universal Declaration of Human Rights and the International Covenant on Civil and Political Rights. At the conclusion of the debate, Ginyo Ganev urged the Assembly to retain the Commission's original wording, arguing that references to culture had rightly met with objections and that "the historical significance of this religion is already adequately expressed through the concept of tradition."

The proposal to delete Article 13(3) was overwhelmingly rejected: 258 deputies voted against its removal, while only 13 supported it. The provision itself was adopted by 266 votes in favour, with 10 against and 5 abstentions. Throughout the debates, deputies repeatedly emphasized that the paragraph carried symbolic rather than legal significance and merely acknowledged the historical contribution of Orthodoxy to the Bulgarian nation.

During the constitutional deliberations, three metropolitans of the Holy Synod also submitted a proposal to introduce an additional paragraph into Article 13 prohibiting civil rituals in the registration of civil status. They argued that the civil ceremonies introduced under socialism represented "an element of the totalitarian ideological organization of public life," because they were atheistic, fostered duplicity and division within individuals, families, and society, constituted unsuccessful and profane imitations of the Christian sacraments, and re-

flected the totalitarian regime's struggle against Christianity, Christian values, and the Christian tradition. The proposal was not considered by the Assembly.

In contrast, there was broad consensus regarding Article 13(2), which established the constitutional principle that "religious institutions shall be separate from the State."

Years later, Petar Obretenov, a Union of Democratic Forces (UDF) deputy and an active member of the Constitutional Commission, recalled the intentions behind the adoption of Article 13(3):

Together with Lyubomir Popov, then protosyncellus of the Diocese of Varna and Preslav and a UDF deputy, we insisted that, instead of restoring the Tarnovo Constitution's formulation proclaiming Orthodoxy the official religion, it should be designated the "traditional religion" of Bulgaria. Personally, I believed that we should not only pay tribute to the Bulgarian Orthodox Church for its immense contribution to the national revival but also provide it with a constitutional point of support from which to participate actively in building a new democratic Bulgaria. I am disappointed that today's senior clergy have not inherited the patriotism and close identification with the aspirations of the Bulgarian people that characterized their predecessors in the struggle for an independent Bulgarian Church, an independent Bulgarian state, and the affirmation of Bulgarian national consciousness.⁶

The 1991 Constitution thus preserved the secular character of the Bulgarian state while designating Eastern Orthodox Christianity as the country's "traditional religion." As the deputies in the Grand National Assembly repeatedly emphasized, this compromise formula was intended to be declaratory rather than normative, carrying symbolic significance by acknowledging the historical role of Orthodoxy in the formation of the Bulgarian nation.

Because the expression "traditional religion" was left undefined and was associated primarily with history, culture, and spiritual values, its meaning gradually expanded beyond the intentions of the constitution's framers. Over time, "Bulgarian traditional values," increasingly understood as the values of Orthodox Christianity, entered constitutional discourse through judicial interpretations of the notion of "traditional religion." As the original historical meaning of the provision faded, these "traditional values" became an important source of constitutional reasoning in the jurisprudence of the Bulgarian Constitutional Court. Through the language of national identity, constitutional identity, and Bulgarian traditional values, the Court effectively incorporated key arguments advanced by the Bulgarian Orthodox Church in two landmark constitutional cases concerning gender relations, protection against domestic violence, gender, and the constitutional meaning of sex (*no.a*) (Constitutional Cases No. 13/2018 and No. 15/2021).

⁶ Available at: https://judgesbg.org/wp-content/uploads/2018/10/P_Obretenov.pdf. [Accessed 13 July 2026]

The Constitutional Court's decisions, together with the preceding mobilization of moral entrepreneurs who generated episodes of moral panic around these issues (Bozhinov 2024), testify to the rise of ethnoreligious and Orthodox nationalism in Bulgaria. This new form of nationalism has emerged within the broader context of post-socialist transformation, globalization, European integration, growing socioeconomic precarity, and widespread economic, social, and cultural insecurity. Equally important has been the role of transnational networks promoting Christian nationalist and anti-gender agendas. Christian nationalism has become a global phenomenon, with its own centres of influence, organizational structures, shared campaigns, and coordinated efforts to shape national policies concerning gender, family, children, reproductive rights, and LGBTQ+ rights. These transnational anti-gender networks include organizations such as the World Congress of Families and Agenda Europe, together with influential churches, including the Russian Orthodox Church, the Serbian Orthodox Church, the Bulgarian Orthodox Church, and various evangelical organizations (Sremac, Ganzevoort 2015; Tranfić 2025).

In Bulgaria, religious NGOs and the Bulgarian Orthodox Church became particularly visible during the campaign against the ratification of the Istanbul Convention in 2018, the mobilization against the National Strategy for the Child in 2019 (Nenova, Luleva, Kotzeva 2024), and subsequent campaigns advocating legislative measures to restrict LGBTQ+ rights, redefine the constitutional concept of sex (2021), and advance broader anti-gender policies. As noted above, ethnoreligious nationalism links national identity to questions of gender, sexuality, family, and children (Friedland 2011). Bulgaria is no exception.

During the campaign against the ratification of the Istanbul Convention, the Bulgarian Orthodox Church emerged as a key political actor alongside other religious organizations and faith-based NGOs. The question of whether the Council of Europe Convention on Preventing and Combating Violence against Women and Domestic Violence was compatible with the Bulgarian Constitution was referred to the Constitutional Court (Constitutional Case No. 3/2018). After considering submissions from the Presidency, the Ministry of Justice, non-governmental organizations, religious organizations, and the Bulgarian Orthodox Church, the Court held that the Convention was incompatible with the Constitution (Smilova 2020).

In its reasoning, alongside its discussion of the concepts of biological sex and gender identity, the Court stated that “the Constitution and the entire Bulgarian legal order are founded upon the understanding of the binary existence of the human species. Traditionally, human society has been built upon sexual binarity, that is, the existence of two opposite sexes.” It further invoked the constitutional definition of marriage “as it has always existed in the Bulgarian legal tradition,” describing marriage as “a voluntary union between a man and a woman” and concluding that “[t]he understanding of marriage as a union between a man and a woman is deeply rooted in Bulgarian legal consciousness and, in this sense, constitutes the foundation of the constitutional regulation.”

The significance of this decision does not lie simply in its affirmation of sex binarity and the constitutional definition of marriage. Rather, these principles are presented as timeless, immutable, and constitutive of Bulgarian constitutional tradition, “as [they have] always existed in the Bulgarian legal tradition.” By contrast, recognizing the concept of *gender* is portrayed as incompatible with Bulgaria’s constitutional identity. Although the Court does not explicitly invoke Orthodoxy or Orthodox traditional values, its insistence on binary sex and heterosexual marriage reinforces a conservative and traditionalist understanding of gender, marriage, and the family. Orthodox normativity operates implicitly, embedded in the constitutional discourse through the language of tradition and constitutional identity, and would become even more explicit in subsequent constitutional jurisprudence. The Court’s reasoning closely mirrors the position submitted by the Bulgarian Orthodox Church, which urged that “the Istanbul Convention should not be ratified because it introduces concepts that stand in sharp contradiction to our Orthodox faith, our national traditions, and our legal system.”⁷

Following the publication of the Constitutional Court’s decision, the Holy Synod of the Bulgarian Orthodox Church issued a public statement declaring:

The Holy Synod of the Bulgarian Orthodox Church expressed its unequivocal opposition to the Convention because it contradicts the Orthodox teaching on the creation of man and woman in the image and likeness of God and as biological beings, and because it introduces concepts incompatible with the Bulgarian social and legal order. All of the judges, guided by the moral foundations of society, the commitment to preserving Bulgarian statehood, and the protection of Bulgaria’s future—our children—united in rejecting the introduction, through an international treaty, of concepts and an ideology incompatible with the traditional Christian morality of the Bulgarian people.⁸

The Holy Synod’s rhetoric is simultaneously theological and political-nationalist. It articulates a vision of the proper moral order for Bulgarian society grounded in traditional Christian morality, the moral foundations of society, the preservation of statehood, and the protection of Bulgaria’s future.

The clearest example of the convergence between Orthodox Christianity, the positions of the Bulgarian Orthodox Church, and the jurisprudence of the Constitutional Court is Constitutional Case No. 15/2021, initiated in response to a request for an authoritative interpretation of the constitutional meaning of the term *sex* (*пол*). As part of the proceedings, the Court solicited opinions from a wide range of interested institutions and experts. In its final decision, however,

⁷ Available at: <https://bg-patriarshia.bg/news/stanovishte-na-svetia-sinod-po-povod-istanbul-skata-konventsia>. [Accessed 13 July 2026]

⁸ Available at: <https://www.pravoslavie.bg/?p=1613224>. [Accessed 13 July 2026]

the Court devoted a substantial part of its reasoning to the historical significance of the Bulgarian Orthodox Church for Bulgarian national identity. From this discussion, it derived not merely a legal conclusion but a normative and value-laden one: that the constitutional concept of *sex* must be understood exclusively in its biological sense.

The language and argumentative structure of the Court's reasoning are particularly revealing.

The Constitutional Court identified three principal lines of argument. The first derives from the constitutional provision defining marriage as "a voluntary union between a man and a woman." The Court went beyond the constitutional text by asserting that comparable constitutional provisions are found in states that have historically been compelled to defend their political and national identity, thereby explaining their attachment to traditional family values.

The second line of reasoning draws on the Constitution's protection of motherhood, which the Court interprets as an expression of the cultural and spiritual traditions of the Bulgarian people.

The third—and most significant—argument concerns what the Court calls "Bulgarian traditional values," specifically "the principal religion (*основната религия*) professed by the overwhelming majority of Bulgarian citizens." Here the Court introduces a formulation absent from the Constitution itself by referring to Orthodoxy as the country's *principal religion* (*основна религия*). It then proceeds to a further level of generalization: Orthodox Christianity, as the principal religion of the Bulgarian people, is presented as the concrete embodiment of Bulgarian traditional values. According to the Court, this conclusion follows logically from the interpretation of Article 13(3) of the Constitution in the following way: The Court states:

This religion is designated in Article 13(3) of the Constitution as the "traditional" religion, which leads to the conclusion that the constitutional legislator in 1991 intended to embed within the constitutional legal order the value system established by Eastern Orthodox Christianity. In this respect, the opinion submitted to the Court by the Holy Synod of the Bulgarian Orthodox Church links Eastern Orthodoxy with the "primordial moral values" and with the "national and constitutional identity of Bulgaria," including those values that have historically served as a source of normative regulation.

This interpretation differs fundamentally from the meaning that the constitution-makers attached to Article 13(3) in 1991. As demonstrated above, the debates in the Grand National Assembly repeatedly emphasized the symbolic and historical significance of the provision. Its purpose was to acknowledge the historical contribution of Orthodoxy to the Bulgarian nation and state, not to accord it constitutional normative force. Indeed, the expression "traditional religion" was deliberately left undefined. The deputies explicitly rejected al-

ternative formulations that would have designated Orthodoxy as the “official,” “dominant,” or “national” religion or as the “foundation of national culture.”

The Court therefore moves beyond the narrow historical understanding of “traditional religion” and attributes to Article 13(3) a purpose that was never expressed by the constitutional framers—namely, that “the constitutional legislator intended to embed within the constitutional legal order the value system established by Eastern Orthodox Christianity.” The parliamentary debates provide no evidence of such an intention. On the contrary, the discussions revolved around whether the Constitution should refer to Orthodoxy as the “traditional religion,” the “foundation of national culture,” or use other formulations, but never around incorporating Orthodox moral values into the constitutional order itself.

Decision No. 15/2021 thus expands the constitutional meaning of Article 13(3), transforming the historical notion of a “traditional religion” into a normative category. The Court progressively reformulates the constitutional text by speaking not only of a “traditional religion,” but also of the country’s “principal religion” and of “the value system established by Eastern Orthodox Christianity.” It reinforces this interpretation by explicitly relying on the opinion of the Bulgarian Orthodox Church, which identifies Orthodoxy with “primordial moral values” and with Bulgaria’s “national and constitutional identity.” Article 13(3) underwent a profound transformation. Originally, it was understood as a provision with symbolic rather than normative significance—a liberal compromise adopted during the drafting of the 1991 Constitution, accepted even by nationalist delegates. In its 2021 decision, however, the Constitutional Court reinterpreted Article 13(3) within the broader context of normalized traditionalism and ethnocultural nationalism. The constitutional declaration that “Eastern Orthodox Christianity is the traditional religion” ceased to function as a merely symbolic recognition of historical heritage and acquired normative force. Its meaning expanded far beyond the intentions of the constitution-makers, becoming re-enchanting through the interpretive repertoire of Orthodox nationalism. In doing so, the Court transformed Orthodoxy from an object of constitutional recognition into a constitutionally legitimate source of moral authority and constitutional interpretation. This shift represents a process of constitutional re-enchantment: religious tradition is no longer simply acknowledged as part of the nation’s past but becomes an authoritative normative resource for defining constitutional values, collective identity, and the moral boundaries of the political community. Through this reinterpretation, Orthodox Christianity emerges as a foundational pillar of the new constitutionalized Orthodox nationalism.

The Court further invokes Article 14 of the Constitution, which guarantees the special protection of motherhood and children by the state and society. According to the judges, it is no coincidence that this provision immediately follows Article 13, since Article 13 proclaims “the significance of Eastern Orthodoxy for the formation of Bulgaria’s cultural, spiritual, and value identity.” Yet this formulation, too, has no basis in the constitutional text itself. Rather, it rep-

resents another discursive expansion of Article 13(3), attributing to Orthodoxy a constitutive role in shaping Bulgaria's cultural, spiritual, and moral identity.

The Court's reasoning is also characterized by a selective reading of the parliamentary debates from the Seventh Grand National Assembly. It quotes only those interventions emphasizing Orthodoxy's contribution to Bulgarian history, culture, and national consciousness while omitting equally important statements stressing that Orthodoxy should not enjoy a privileged constitutional status, that a secular state must remain equally distant from all religious denominations, and that the expression "traditional religion" was adopted precisely as a symbolic acknowledgment of Orthodoxy's historical role rather than as a source of constitutional norms. The Court likewise ignores the fact that proposals to describe Orthodoxy as the "official," "dominant," or "national" religion, or as the foundation of national culture, were explicitly rejected during the constitutional debates.

The passages selected by the Court include statements that Orthodoxy "is indeed the foundation of our culture," that it has "profoundly shaped our national psychology," that it constitutes "the foundation of Bulgaria's national culture," that "the brightest pages of our national history were written thanks to Eastern Orthodoxy," that Article 13(3) "effectively establishes as a fundamental norm of thought and conduct what already exists in the spiritual world of the Bulgarian people," that "the historical significance of this religion is contained in the very notion of tradition," and that "Orthodoxy is most closely linked with the national idea; it represents a tradition deeply absorbed into the consciousness of the Bulgarian people."

Finally, the Court introduces the concepts of "constitutional tradition" and "national constitutional identity," deriving them from the fact that the Tarnovo Constitution designated Eastern Orthodoxy as the "dominant religion." In doing so, however, it overlooks the crucial fact that this formulation was neither adopted nor even seriously considered during the constitutional debates of 1991. Nevertheless, the Court treats Article 13(3) as a continuation of the Tarnovo constitutional tradition, thereby interpreting the constitutional expression "traditional religion" as functionally equivalent to "dominant religion."

The Court continues:

As an exception to the general model of contemporary European constitutions, Article 13(3) has a specific significance for delineating Bulgaria's cultural and spiritual identity, as understood by the constitutional framers when adopting the Constitution, and this significance must be taken into account in its interpretation. This is all the more so given that Article 37 of Bulgaria's first constitution—the Tarnovo Constitution of 1879—designated Eastern Orthodox Christianity as the "dominant religion." In this sense, one may speak of a constitutional tradition of essential importance for the formation of Bulgaria's national constitutional identity.

The following passage is equally revealing. The Court acknowledges that, under the contemporary constitutional order, the Church is separated from the State and that religious norms no longer possess the regulatory force of legal norms. It nevertheless concludes:

The designation in the Constitution—the foundation of the state’s legal system—of a particular denomination as the traditional religion is certainly not without significance. Its importance manifests itself primarily in the interpretation of those constitutional concepts that, until the relatively recent past, were regulated by the norms of that very religion. It should therefore be recalled that until the adoption of the Marriage Ordinance Act in 1945, Bulgarian family law was governed by canon law rather than civil law. The binding legal norms governing engagement, marriage, and divorce derived from the Statute of the Bulgarian Orthodox Exarchate, even though the Tarnovo Constitution, widely regarded as liberal and democratic for its time, was in force.

The Court thus interprets Article 13(3) through the lens of Orthodox canon law governing marriage prior to 1945. Historical and anthropological scholarship, however, has demonstrated that engagement, marriage, and divorce were never regulated exclusively by canon law. Alongside ecclesiastical norms, customary law and local community practices continued to play an essential role, particularly in rural Bulgaria. By presenting canon law as the sole normative framework for family relations before 1945, the Court reinforces its broader argument that Orthodox legal norms historically governed family life and that this normative tradition is transmitted through Article 13(3) of the Constitution. In other words, the constitutional recognition of Orthodoxy as Bulgaria’s “traditional religion” is interpreted as encompassing the normative content of Orthodox canon law, which is subsequently invoked as an expression of legal tradition and of the enduring values of Bulgarian society.

The Court then states that it “finds it necessary to note” the close historical relationship between the Bulgarian state and the Orthodox Church, beginning in the early Middle Ages. It recounts the Church’s role in the struggle for ecclesiastical independence, the adoption of Christianity as the official religion, the introduction of the liturgy in the Bulgarian language, and the creation of the Bulgarian alphabet. The historical narrative continues into the nineteenth century:

The Bulgarian Orthodox Church played an important historical role as a national institution and as a factor in the formation of Bulgarian national and state identity. This is all the more evident given that the process of restoring Bulgarian statehood, which culminated in 1878, began with the struggle for an independent Bulgarian Church and the use of the Bulgarian language in worship during the nineteenth century. The Church thus made an undeniable contribution to the development and preservation of the written and spoken

Bulgarian language, a central marker of identity within the multinational and religiously diverse Ottoman Empire.

If one wonders why a constitutional judgment whose purpose is to determine the meaning of the constitutional concept of *sex* devotes such extensive attention to the historical mission of the Bulgarian Orthodox Church, the following paragraph provides the answer:

For these reasons, the Court considers that the appropriate method of constitutional interpretation in the present case must also be value-oriented and normative, whereby law as a system of universal rules of conduct cannot be interpreted without taking into account the values established in society and relevant to the subject matter of interpretation, values deriving from other normative systems such as religion, morality, and custom.

Religion—and, in this case, Orthodox Christianity together with its moral teachings—thus becomes an explicit source of normative values guiding constitutional interpretation. Significantly, although the Court refers to “custom” alongside religion and morality, its reasoning throughout the judgment focuses almost exclusively on Orthodox Christianity.

The Court further supports this interpretive approach by invoking the authority of Professor Zhivko Stalev, one of Bulgaria’s most distinguished legal scholars and President of the Constitutional Court (1997–2000). His book *The Normative Force of the Factual* (1997) is cited both in the opinion submitted by the Holy Synod and in the Court’s own reasoning. The following passage is reproduced:

There are three fundamental groups of social relations that have always been present within the sphere regulated by law: family, possession, and hierarchy (authority and subordination). Law discovers these relations rather than creates them, because they existed long before the emergence of law itself. They rest upon three biological instincts—the sexual instinct, the feeding instinct, and the instinct for social living—which continue to determine human behaviour. Having existed for approximately 2.5 million years, these tendencies may be regarded as genetically programmed, that is, innate. This explains why they have always formed part of the subject matter of legal regulation. They are natural, ineradicable, and permanent companions of humankind as a biological species. What may change is only the legal regulation of these relations, not their existence. Any attempt to abolish them is a utopian illusion (Stalev 1997: 99).

This passage reveals the author’s essentialist understanding of the family and social relations as being biologically grounded in three instincts—the sexual

instinct, the feeding instinct, and the instinct for social living—which continue to determine human behaviour and therefore render these relations “genetically programmed,” “innate,” “ineradicable,” and “eternal.” Such biological reductionism may be consistent with the views of the Holy Synod, but it is highly problematic as a line of reasoning in a Constitutional Court decision. Social relations are far more complex and culturally constituted than can be explained by reducing them to human instincts. Moreover, the author moves from the claim that certain forms of social relations have existed for thousands of years to the conclusion that they are natural, immutable, and incapable of being abolished. Indeed, the proposition that patriarchal social relations are eternal, immutable, and derived from the natural differences between the two sexes constitutes one of the central claims advanced by defenders of the traditional family and by anti-gender movements supported by religious organizations.

Zhivko Stalev’s understanding of marriage and the family as natural institutions clearly resonates with the Constitutional Court’s reasoning. The Court concludes:

It is precisely in this context [namely, Stalev’s argument] that the Constitution’s understanding of sex in its biological sense constitutes an expression of Bulgaria’s national constitutional identity, intended to preserve “the connection between the Constitution itself and the people whom it is meant to serve.”

In summary, Decision No. 15/2021 fundamentally transforms the constitutional meaning of Article 13(3). Whereas the constitutional framers and the early jurisprudence of the Constitutional Court (1992–2003) interpreted the provision primarily in historical terms, recognizing the contribution of Eastern Orthodoxy to the formation of the Bulgarian state and culture, Decision No. 15/2021 moves well beyond this understanding. Orthodoxy ceases to function merely as a historical fact. Instead, the constitutional notion of “traditional religion” is invested with a much broader meaning and comes to signify the primordial Orthodox moral values embedded within the constitutional legal order. Consequently, it becomes a legitimate source of constitutional interpretation concerning sex, marriage, the family, and human nature.

By linking the traditional family, biological understandings of sex, national identity, and Orthodox Christianity, Decision No. 15/2021 constitutes a paradigmatic example of Orthodox religious nationalism. It was welcomed by religious organizations and by the Bulgarian Orthodox Church because it effectively incorporated their arguments into constitutional jurisprudence, reaffirmed Orthodoxy as the cornerstone of national identity, and recognized it as the bearer of the nation’s fundamental values. In this interpretive framework, “Bulgarian traditional values” become virtually synonymous with Orthodox Christian values. Liberal constitutional principles centred on individual rights give way to a jurisprudence increasingly informed by religious conservatism

and ethnoreligious nationalism. By transforming Orthodoxy into a constitutional source of national identity and a legitimate interpretive resource for the Constitution, Constitutional Court Decision No. 15/2021 constitutes a striking example of the re-enchantment of constitutional discourse and the constitutionalisation of Orthodox nationalism in Bulgaria. By linking Orthodox values with national identity, the traditional family, biological sex, and constitutional tradition, the Court shifts constitutional reasoning away from universal rights toward a civilizational understanding of the Bulgarian nation.

The decision also recalls Talal Asad's argument that the secular state does not eliminate religion but rather reconfigures it by determining the conditions under which religious traditions acquire public authority (Talal Asad 2003). In this case, the Constitutional Court performs precisely such a reconfiguration. It does not abolish the separation of church and state; rather, it redefines the place of Orthodoxy within the constitutional order by transforming the Orthodox tradition into a legitimate interpretive resource and constituting a particular understanding of Orthodoxy through constitutional law. Decision No. 15/2021 may therefore be read as an instance of the re-enchantment of constitutional discourse, in which the authority of constitutional interpretation comes to rest not only on secular legal rationality but also on a sacralised understanding of national tradition. Decision No. 15/2021 marks a turning point in Bulgarian constitutionalism. By transforming Orthodoxy from a historically acknowledged tradition into a legitimate normative source of constitutional interpretation, the Court constitutionalizes Orthodox nationalism and exemplifies a broader process of the re-enchantment of constitutional discourse in post-socialist Europe

Public Discourse

The reinterpretation of Orthodoxy is equally evident in contemporary political discourse. From official speeches delivered on major Christian holidays and legislative initiatives such as the introduction of the school subject "Religion and Virtues" to Bulgaria's position on the European Union's sanctions against the Russian Patriarch Kirill, Orthodoxy is repeatedly invoked as a defining element of Bulgarian national identity. Across these debates, Orthodoxy is presented as the foundation of the nation. Since 2018, the promotion of "traditional values"—implicitly or explicitly identified with Orthodox Christianity—and the portrayal of the Bulgarian Orthodox Church as an active participant in state governance have become increasingly prominent features of political discourse. Numerous public statements by President Rumen Radev and, later, President Iliana Yotova have emphasized the importance of Orthodox values for the Bulgarian nation and Bulgaria's belonging to the Orthodox world.

This discourse gradually normalizes the privileged position of Orthodoxy within the state—precisely the outcome that the framers of the 1991 Constitution sought to avoid. Commenting on Bulgaria's reservations regarding the European Union's sanctions against the Russian Patriarch Kirill, President Yotova

declared, “We are an Orthodox state. We do not want Bulgarian believers to be divided along these lines because Orthodoxy is so deeply rooted in our history. I would do everything possible to avoid such a conflict.”⁹

Although this statement is political rather than constitutional in nature, it directly contradicts the constitutional principle of state secularism. More importantly, it illustrates how public discourse has gradually shifted the boundary between the constitutional notion of a “traditional religion,” whose meaning had already been substantially expanded by the Constitutional Court, and the political imagination of Bulgaria as an “Orthodox state.” This shift reflects the broader process through which Orthodox Christianity has come to function not merely as a historical tradition but as the principal moral foundation of the Bulgarian nation and an increasingly legitimate source of constitutional and political authority.

Conclusion

The first decades of Bulgaria’s post-socialist transition witnessed a shift from state-socialist atheism, implemented through systematic educational and ideological policies between 1944 and 1989, to an ethnocultural form of desecularization, in which religion gradually re-entered the public sphere and assumed an increasingly visible role. Orthodox Christianity came to be identified with the traditional values of the Bulgarian nation. Initially, this development was widely understood as an act of historical justice, redressing decades of persecution of clergy, informal restrictions on religious practice, and the heritage-making and secularization of religious monuments under state socialism.

The religious revival after 1989 reflects not only the failure of more than four decades of official atheist propaganda. It also demonstrates the resilience of cultural memory as a foundation of religious belonging (Hervieu-Léger 2000) and the continuing desire of many Bulgarians to identify with a particular cultural and confessional community. Yet the gradual erosion of the boundary between the private and the public in the promotion of Orthodoxy reveals a process that extends beyond desecularization or religious revival. It points instead to the religionization of the public sphere—of legislation, constitutional interpretation, and education—through the active involvement of state institutions. This growing symbiosis between the Bulgarian state and Orthodox Christianity, together with the construction of Orthodoxy as the foundation of national identity, constitutes a defining feature of contemporary Orthodox nationalism in Bulgaria.

This article has traced the discursive transformation of Article 13(3) of the 1991 Constitution, which declares Eastern Orthodox Christianity to be the “traditional religion” of Bulgaria. I have shown how a constitutional provision

⁹ Йотова защити аргументите на Радев за санкционния пакет срещу Русия. 21. 06.2026 Available at: <https://bnrnews.bg/main/post/492767/yotova-zashtiti-argumentite-na-radev-za-sanktsionniya-paket-sreshtu-rusiya> [Accessed 13 July 2026]

originally intended as a symbolic acknowledgment of Orthodoxy's historical significance has been progressively reinterpreted by the Constitutional Court as a normative source of constitutional reasoning. Through Decision No. 15/2021, Orthodoxy is no longer treated merely as a historical tradition but as the bearer of the moral values underlying the constitutional order and as a legitimate interpretive resource for constitutional adjudication. In this sense, the judgment represents a striking example of the *re-enchantment* of constitutional discourse.

The title of this article—*From State-Socialist Atheism to Orthodox Christian Nationalism*—should therefore not be understood as suggesting that the Bulgarian Constitution formally establishes Orthodoxy as a state religion. Rather, it refers to a more subtle yet far-reaching transformation: within the jurisprudence of the Constitutional Court, Orthodox Christianity has acquired the status of a legitimate source for interpreting the constitutional order.

In brief, I would describe the process of re-enchantment as follows: after 1989, Bulgaria experienced retraditionalization (Luleva 2020), the revival of religion, desecularisation and the gradual expansion of traditionalism and ethnocultural nationalism. After 2018, re-enchantment also extended to jurisprudence through implicit references to the nationalist repertoire of Orthodoxy. The Constitutional Court's 2021 decision marked the next stage in this process, as the nationalist repertoire of Orthodoxy was explicitly employed for constitutional interpretation, thereby re-enchanting constitutional discourse and constitutionalizing this repertoire, transforming it into a pillar of ethnoreligious and Orthodox nationalism. Consequently, by 2026 the political statement "Bulgaria is an Orthodox country" no longer sounded unusual, while the constitutional provision that "Orthodoxy is the traditional religion" increasingly came to be understood as meaning that "Orthodoxy is the state religion."

More broadly, the Bulgarian case demonstrates that religious nationalism is not simply a matter of religious revival. It is a process through which the state, the nation, and the constitutional order are re-sacralised through Orthodox tradition. This process simultaneously redefines the relationship between religion and constitutionalism and narrows the boundaries of political belonging. By privileging Orthodox Christianity as the moral foundation of the nation, Orthodox nationalism marginalizes other religious communities and non-believers alike, thereby weakening the civic conception of the nation and eroding the liberal-democratic principles of constitutional pluralism and state neutrality.

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BOOK REVIEWS

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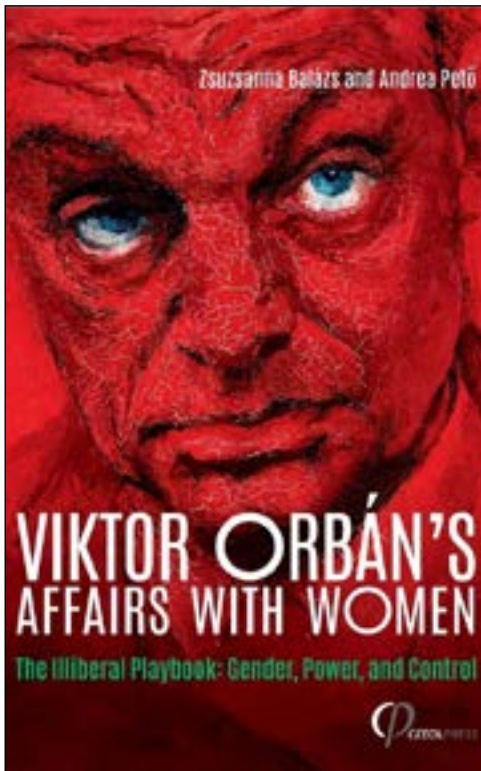
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Viktor Orbán's Affairs with Women: Illiberal Gender Politics, Power, and Control

Zsuzsanna Balázs – Andrea Pető: *Orbán Viktor's Affairs with Women: The Operation and Effects of Illiberal Gender Politics (WomanPress, Dunaszerdahely, 2025), 318 pp.*

Andrea Pető, Zsuzsanna Balázs: *Viktor Orbán's Affairs with Women. The Illiberal Playbook: Gender, Power, and Control (CEEOL Press, 2026)*



Historian Andrea Pető and science journalist Zsuzsanna Balázs jointly authored *Orbán Viktor's Affairs with Women: The Operation and Effects of Illiberal Gender Politics*. Pető was the first in Hungary to introduce the term “women’s historian” (*nőtörténész*), and she is currently a twice-expelled professor at Central European University, where she teaches in the Department of Gender Studies. Her earlier monographs—on Júlia Rajk, women of the Arrow Cross movement, women raped during the Second World War, and the 1944 massacre of Jews at 64 Csengery Street—were written without co-authors. She has also long published public and political commentary, including works explicitly addressing Orbán’s illiberal politics. Zsuzsanna Balázs worked for years at Qubit, the science section of *444.hu*, and later launched her own YouTube channel, *Szubkontra*.

Orbán Viktor's Affairs with Women is a popular-academic work in the best sense of the term; it is simultaneously a manifesto, an appeal to Hungarian women voters, and an ethnographic explanation for the rest of the world. Indeed, within half a year of the 2025 Hungarian edition, the English translation appeared.

The presentation itself is a statement—beginning with the covers. The Hungarian edition appears in a vivid cyclamen hue reminiscent of feminist purple. At the top, any Hungarian high-school graduate will recognize the Holy Crown of Hungary with its tilted cross (which remained upright until 1638, when it was damaged in Bratislava during the coronation of Maria Anna of Habsburg, wife of Ferdinand III). Yet the hemispherical form of the crown is suggestive of the symbol of womanhood. The punchy, tabloid-style title—*Orbán Viktor's Affairs with Women*—is eye-catching; the precise, explanatory subtitle (*The Operation and Effects of Illiberal Gender Politics*) only becomes apparent later. Readers hungry for scandal may prick up their ears: is a new exposé forthcoming about Hungary's political elite, whose authority has been badly shaken in recent years by sexual scandals (a married politician's orgy, pedophilic sexual exploitation, even human trafficking; the presidential pardon granted to the aide of the notorious "Uncle János" from Bicske; and sexual abuses at the Szőlő Street juvenile correctional facility for boys, including allegations that the director prostituted female wards, earlier in state care to mention only the most prominent)? Will we finally learn the identities of Orbán's lovers? Those expecting such revelations will be disappointed: we learn nothing about the prime minister's private life, but a great deal about the UN Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), broader social issues affecting women, and the Orbán government's gender policies through rigorous public-policy analysis.

The English edition, aimed at an outside audience, abandons the frivolous pink of the crown in another reading, diabolical—red. Orbán himself appears on the cover; the focus shifts from women's policy to the ruler. His weary, burdened face, gazing upward from below, is fractured, as if split by an earthquake—a graphic allusion to the system's fragmentation and incipient decay. The subtitle is slightly altered (*The Illiberal Playbook: Gender, Power, and Control*), exploiting the concision of English to foreground power and control, and echoing a familiar political-science argument: the Hungarian illiberal regime functions as a model, a user manual—a board-game rulebook—warning that this playbook can be replicated anywhere.

Those who followed Hungarian politics in 2017 will recognize the cynical remark referenced by the now proverbial title. When Orbán withdrew the appointment of a high-ranking female career diplomat serving in Washington, whom parts of the Hungarian public, convinced that women cannot rise on their own merits, had romantically linked with "the boss"—journalists asked why she had been dismissed. Orbán merely replied with a wink: "I don't deal with

women's affairs." The title and cover are thus somewhat deceptive—clickbait, one might say. Even colleagues in gender studies might be misled into expecting a sensationalist account. In contrast, the book is in fact a rigorous public policy analysis presented in an accessible format, reminiscent of a well-established Anglo-Saxon historiographical tradition.

Across a dozen chapters, the book examines the feminist-relevant scandals of the past sixteen years, systematically aligned with the chapters of CEDAW (a UN convention from 1979, ratified in Hungary in 1982). Fortunately, the convention was drafted at a time when Hungary was still a communist party-state, eager to present itself at the UN—supporting the “developing world”—as progressive on women's issues, while portraying the West, anchored in the Napoleonic Code, as patriarchal and backward. Accordingly, Hungary ratified the convention in 1982 without debate. CEDAW did not share the fate of the Council of Europe's 2011 Istanbul Convention on preventing and combating violence against women and domestic violence, which the Hungarian parliament declared it would never ratify, alleging that it would import migrants and “gender ideology” into the Carpathian Basin.

I would never have thought that an abstract legal text could be combined with high-profile media scandals and criminal cases—but it works. Each chapter opens with a quotation from CEDAW as a motto. Two appendices conclude the book: one lists legislative amendments from 2010 to 2025 relevant to women's policy; the other presents statistical data to illustrate the chapters' arguments. The bibliography spans forty-five pages of secondary sources.

To offer a mixed sample of themes and scandals addressed: sexist discrimination; the use of naked young women in advertisements on wholesale delivery vans supplying chefs; women's ordeal in Hungarian courts and the failure of victim support in cases of violence against women (the “acid doctor” case, an acid attack by a hospital director on her former lover, and the “Darnózseli butcher”, the murder of an ex-wife by the butcher husband who actually did away with the body according to his profession); the sexual exploitation of women through prostitution (the *puncs.hu* sugar-daddy platform and Hungarian porn mogul Lajos Gattyán, later with political aspirations and great supporter of children's homes); women's underrepresentation in public office and political life; the cases of Katalin Novák (the first woman president of Hungary who had to resign over a pardon case) and the Norwegian Civil Fund (its independent CSO recipients being the victims of a coordinated government attack as “foreign agents”, many feminist organisations included); health care and family-planning services (Hungarian maternity wards, Ágnes Geréb, the Hungarian obstetrician who introduced home-birth and was imprisoned later, and the “fetal heartbeat” law, an extra obstacle before legal abortion for pregnant women introduced in 2022); discrimination against rural women (the Mikepércs mothers protesting environmental pollution caused by forced industrialization near Debrecen, mostly by foreign battery factories); and more.

One theme deserves particular emphasis: family policy. Barely a year after its election, the second Orbán government oversaw Hungary's six-month presidency of the Council of the European Union in 2011, largely prepared by its predecessors. At that time, it replaced the customary high-level event on gender equality with one on "family mainstreaming" rather than "gender mainstreaming" (placing gender equality at the center of all policy areas versus placing families at the center of all policy areas). No one had used this term before. At the time, we could not foresee the subsequent assault on gender studies and CEU, the "Soros" university, the first to offer such degree in Hungary, or the political attacks conflating women's rights with gender identity—attacks later enshrined in legislation and in a uniquely Hungarian ideological system: the anti-gender culture war, and now more than a mere culture war.

Visitors landing at Budapest's Franz Liszt Airport used to encounter not only maps but forests of advertisements and billboards proclaiming, in multiple languages: *Family-Friendly Government. Welcome to Family-Friendly Hungary!* What this slogan truly denoted, however, is absence—what Hungary was not friendly toward: migration and "gender," whatever that may mean. Pető and Balázs argue persuasively that this is only a political product. Reality tells a different story. In my view, six of the twelve chapters are devoted to demonstrating precisely this.

The chapter "The New Cult of Femininity" invokes Betty Friedan's iconic work, *The Feminine Mystique* describing 1960s America, where middle-class women were pushed back into kitchens and nurseries, producing alienation, inexplicable health problems, and alcoholism. After a historical overview, the chapter situates Orbán's-style of family policy and its conception of women: women are sacrificed on the twin altars of demography and the capitalist labor market. They are asked to bear at least three children and to return quickly to paid work, functioning as if they had no caregiving responsibilities.

Similar contradictions exist elsewhere in the Global North—children are needed to be borne by women, and the labour force of women is also needed—but without the constant emphasis on locally "produced" demography. In countries with social democratic traditions, working mothers are supported by robust welfare states, childcare, healthcare, and education systems, and by fathers "domesticated" through decades of gender-equality-oriented public policy. Hungary does have a generous childcare allowance system (*gyes*), includes female university students in earnings-related parental leave (*gyed*), and—under the so-called "comprehensive agreement with women"—is gradually exempting mothers with multiple children from personal income tax (except mothers of one child). Early retirement through the "Women 40" scheme is available; numerous loans and subsidies support housing acquisition; kindergartens are free; and providers can waive crèche fees. Their good fortune, like CEDAW's, is that these institutions were created "under the old regime"—had they been invented later, they would certainly not be free. Even now, the introduction of crèche fees weighs heavily on the government's conscience.

Yet anyone living in Hungary knows that conditions are steadily deteriorating. Kindergarten group sizes are increasing, trained educators are in constant decline, and health care is a lottery that actively relies on unpaid family labor—primarily by women—and total self-sacrifice. Hungarians, as learned under socialism, “vote with their feet”: many young people and families with small children leave the country, opting to bear and raise their children abroad. These issues are explored across six chapters.

The concluding chapter, *The Orbán Government: Friend of the Deserving Families*, invoking famous Hungarian sociologist Zsuzsa Ferge's concept of “perverse redistribution,” analyzes the economic dimension of family friendliness. As the authors write:

The primary instrument through which the Hungarian government, defining itself as family-friendly, supports women willing to give birth and their partners is not transfers but taxation. That is, it promotes childbearing not by what it gives in return, but by what it refrains from taking away (...). It is not difficult to see that Hungary's family support system grants a substantial advantage in maintaining living standards only to those with exceptionally high incomes, allowing them to contribute a proportionally insignificant amount of tax from their high salaries to the common budget.

The social cost is a growing number of children living in deep poverty, some of whom—illegally, yet precisely for this reason—end up in child-protection institutions, i.e., state care. What fate awaits children in state care today, in 2026 rather than in the days of *Oliver Twist*, is now known even to those who bury their heads in the sand.

Critics have labeled the Orbán regime in various ways: ex liberal politician turned advisor Bálint Magyar describes it as a mafia state; ex liberal politician turned expert Zsuzsanna Szélényi as a disintegrated country (in English: a rotten democracy); political scientists refer to it as a hybrid regime or electoral autocracy. Pető uses her own term: “polypore.” A polypore is a parasitic fungus living on tree trunks, whose sole aim is self-preservation. It extracts from the tree whatever resources it needs, keeping the host alive only because it serves as a resource. A polypore state likewise does not aim to ensure that all citizens feel secure or thrive; instead, it concentrates resources for a narrow group—the polypore living off taxpayers. This logic is visible in family policy as well (the term “social policy” is deliberately avoided). Fidesz's ruling system, as they named it by magic of the words, the NER (the System of National Cooperation) has absorbed and repurposed domestic, European, and international anti-discrimination and equality frameworks, channeling state support to civil organizations aligned with conservative family ideals, and transforming a demographic justification of women's policy into an exportable, international, trendy product.

One of the book's central questions is this: if family-based women's policy in Hungary is so demonstrably illusory, why do so many women vote for Fidesz-KDNP? The manuscript, finalized in August 2025, still treats Fidesz as the women's party and assumes that opposition parties must court women, voters. The book investigates how this situation arose and whether it can be changed. The epilogue—one of the most abstract sections—addresses this in *The Illiberal Handmaid's Tale*. Drawing on her extensive research on national-conservative women's policy, Pető argues that the crisis of liberal women's policy after the regime change—amid neoliberal losses—paved the way for conservative alternatives:

Exploiting this situation, civic conservatives and the far right offered female voters—who saw themselves as losers of the liberal model—a functioning, or at least widely appealing, proposal. This proposal rests on the simple claim that citizens are born either women or men, with no additional options. Gender comes with predefined roles: men belong in the labor market and politics; women primarily in the family. If they wish, or if family survival requires it, women may choose from available jobs—even if they are unlikely to find one that would allow them to live independently. Thus, family, rather than woman, became the central subject of conservative women's policy.

So where do women vote, really? And what do they actually want? (One might quietly ask: who exactly are “these many women” in the Tisza-movement islands?) What place does public policy assign to them? The book does not address the fact that, before 2010, there was no coherent, committed women's policy, even though formal advisory bodies nominally existed. Feminist organizations were treated ambivalently even then. Nothing illustrates this better than the fact that no Hungarian feminist organization has *ever* been included in the state delegation to the UN Commission on the Status of Women in New York, while ultra-conservative groups have been, unlike Croatian or Bulgarian women's organizations, which have been invited for decades despite political conflict. The 2014 volume *The Price of Childless Years* (*Nőtlen évek ára*), produced by the Hungarian Women's Lobby, likewise concluded that no post-1989 government had treated women's policy as a priority.

Since 2014, EU guidelines have advanced, and Hungary must implement them. The feminist movement has become diverse and resilient; nearly forty years of work cannot be erased, and ideas are restrained only in North Korea, hardly even there in the digital age. Yet Hungarian politics remained until now traditionally masculinist. Thus, despite abundant research on backlash generated by illiberal regimes and populist far-right parties, Hungary lacks a clear baseline against which to describe regression—at least in women's policy. When was women's parliamentary representation radically better after 1990? Meanwhile, the deterioration of key systems disproportionately affecting women's health

care, education, elder care, disability services, child protection, social services, and public transport is largely structural. The retirement of the backbone workforce—the caryatids, mostly women—has no visible remedy.

The authors note that Hungarian civil-sector actors, including women's movements, tend to view themselves as victims—not the NER-favored organizations, but the “Norwegians,” the “traitors,” the “foreign agents.” Instead of martyrdom, they advocate grassroots organizing. This review cannot fully explore the sector's diversity, the unintended positive funding effects of political attacks, or non-NER hostility toward women activists (the manosphere, contemporary misogyny, or silencing of radical feminists even from progressive quarters). What is clear is that major Western donors also demand that grassroots and frontline organizations be present in Hungary. They exist and continually emerge—as with the Mikepércs mothers analyzed in the book. Polypore or not, the tree lives and resists.

The book's very publication attests to this. As revealed at launch events hosted by CEU, no publisher in Hungary dared to release it; it ultimately appeared through a small Hungarian publisher in Slovakia, WomanPress, in Dunaszerdahely.

Since 12 April, 2026 when the newly emerged Tisza party's, or rather leader Péter Magyar's two-thirds landslide victory rewrote history political scientists will also have to rewrite what they think about women's political mobilization, party preferences, numbers and roles filled in political representation.

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Space and Time in Boyko Penchev’s *Progressives and Conservatives*

Бойко Пенчев. Прогресисти и консерватори. София: УИ Св. Климент Охридски, 2023, 384 с., ISBN 978-954-07-5626-4
Boyko Penchev. Progresisti i konservatori. Sofia: UI Sv. Kliment Ohridski, 2023, 384 s., ISBN 978-954-07-5626-4



There is an almost emblematic photograph from the early 1990s in which Boyko Penchev, Plamen Doinov, Georgi Gospodinov and Yordan Eftimov pose in a way that ironically recalls the legendary 1905 photograph of the *Misal* circle. The gesture simultaneously parodies cultural tradition and its clichés, while also declaring a desire for a new form of intellectual presence in Bulgarian literary life. Such a photograph was undoubtedly conceived as a youthful game with literary history. Yet, from the distance of time, it may now be seen as symptomatic of an entire generation that entered Bulgarian literature and literary studies with the ambition not only to rearrange the canon, but also to transform the very ways in which literature is thought.

Within this context, Boyko Penchev occupies a distinctive place. He

belongs to a critical and literary milieu which, during the last decade of the twentieth century and the beginning of the new century, unsettled Bulgarian literature through a series of provocative gestures. Since the 1990s, Penchev has been recognisable as an author who problematises academic inertia, national-literary pathos, and the established boundaries between critical writing, literary play and public gesture. Georgi Gospodinov turned the fragment, memory and melancholy into recognisable signs of the new Bulgarian prose; Plamen Doinov built a powerful archival and literary-historical project around the literature of socialism; Yordan Eftimov developed one of the most consistent lines of critical thinking on poetry, ideology and literary discourse; while Boyko Penchev distinguished himself through his ability to transform literary analysis into intellectual provocation. This generational visibility has not only an aesthetic but also a public dimension, insofar as all four authors have remained persistently present in the field of literary and cultural debates after 1989.

At its best, provocation in Penchev's work functions as a way of displacing the usual literary-historical order, of calling into question familiar and firmly established periodising or ideological models, and of viewing well-known literary situations from an unexpected angle. In this sense, Penchev may be understood as a scholar of the new time: one who does not accept tradition as an immobile archive, but turns it into a field of tension, dynamics, conflict and renewed conceptualisation.

In compositional terms, *Progressives and Conservatives: Temporal Models in Bulgarian Literature from the Late 1940s to the 1970s* (Sofia: St Kliment Ohridski University Press, 2023) is structured as a gradual movement from the theoretical formulation of the problem of time towards readings of specific literary-historical cases through which this problem is developed and complicated. The book begins with a methodological introduction concerning literature between the experience of the past and intuitions of the future. It then proceeds to an analysis of communist progressivism as a mode of thought in which the future governs the present and rearranges the past. Subsequent chapters are devoted to socialist realism, Stalinist poetry, the novel of the first half of the 1950s, the figure of the *esnaf* or petty-bourgeois mentality, and the spatial turn. From this point onwards, the study moves towards the 1960s, where Penchev identifies a form of conservative revolution expressed through themes such as the return to the past, the rehabilitation of kinship, the archaic and the primitive, and the increased importance of the mythological, the Dionysian, the pagan and the erotic. Thus, the overall composition of the book traces a movement from the ideologically guaranteed future of communist doctrine towards different forms of returning past; from the linear progressivist narrative towards cyclical, local, kinship-based and mythical models of time. This internal logic prevents the individual chapters from appearing as separate studies of different authors and problems. Instead, they become parts of a common literary-historical plot concerning the transformation of Bulgarian literature between the late 1940s and the 1970s.

Penchev's theoretical framework relies above all on Bakhtin's concept of the chronotope and on Reinhart Koselleck's categories of the "space of experience" and the "horizon of expectation". Through these concepts, the book thinks literature not as a mere sequence of themes and plots, but as a field in which past, present and future are arranged in various ideological and artistic configurations.

In their book *Theory of Literature: The New Century*, Evgeniya Pancheva, Amelia Licheva and Miryana Yanakieva outline the paths, directions and expectations of literary studies after postmodernism. If we read Penchev's *Progressives and Conservatives* through the prism of contemporary critical approaches to the literary work, we discover that he does not simply reconstruct or reread ready-made models. Rather, he builds an approach that does not obey a single school, but combines historical-poetological, ideological, chronotopic and cultural-historical analysis. After postmodernism, numerous new theoretical attitudes and approaches have emerged—hypermodernism, pseudomodernism, metamodernism, cosmomodernism, performatism, ecocriticism, posthumanism and others—producing a series of new terms and concepts. Penchev's approach does not belong directly to any one of these theoretical schools, yet it is related to them through its effort to move literature beyond self-enclosed textuality. From this perspective, his book does not follow one single methodological doctrine; rather, it constructs a flexible historical-poetological model. Almost ironically, at the end of the book the author writes: "This book was written over the course of about fourteen years. However much I have tried to be consistent in my exposition, the attentive reader will probably notice differences in the scholarly approach and value commitments in the different parts of the text. This is inevitable. People change; literary scholars do too." Penchev does not read literature merely as textuality or intertextuality. He returns it to historical experience, ideology, ethics, power, the body and memory, where different scholarly approaches build a complex yet coherent historical-poetological model.

In the book, the grand narrative of communist progressivism is connected with the ideas of the future, history, revolution, the new man and socialist development. Later, this narrative is shaken, and literature begins to be thought in relation to other forms of experience: kinship, myth, the archaic, memory and locality. Ultimately, the study is sensitive to a problem also raised by newer theoretical approaches: what happens to literature after the crisis of grand ideological narratives?

The ethical dimension, in turn, shifts attention away from purely formal, linguistic or deconstructive readings towards questions of responsibility, trauma, memory, testimony, care, violence and human vulnerability. In Penchev's work, ethical concerns are present indirectly. His book examines how the literature of socialism models the human being in time: as a builder of the future, as a self-conscious hero, as part of a collective historical project, and later as the bearer of kinship, bodily and mythical memory. *Progressives and Conserv-*

atives does not treat ethics as an explicit and separate topic. In this way, Penchev avoids reducing literature to a direct ideological function. Nevertheless, his analysis has an ethical stake, because it shows how ideological regimes produce certain models of the literary and the human: the hero of the future, the self-conscious builder of socialism, the petty bourgeois, the primitive, kinship man and mythical man.

For Penchev, space of course has its geographical dimensions. More importantly, however, it also has a temporal function. On the one hand, the valley, the village, the Rhodopes and archaic places are concrete localities and locations. On the other hand, they are interpreted as places where time thickens, slows down, repeats itself and escapes the progressivist line. This is of key importance, because space is thereby presented as an alternative to progressive and revolutionary time.

This becomes visible already in the chapter "The Spatial Turn", whose subsections are highly symptomatic: "Where Is Bulgaria?", "Genealogy of the Valley", and "The Wrong 'Century'". This composition shows that space is thought of as a way of rearranging the question of time: Bulgaria, the valley, the village and the century are interpreted as different forms of historical and cultural experience.

The very fact that Penchev places the spatial turn between the analysis of the time of the *esnaf* and the chapter on the conservative revolution of the 1960s shows that space is conceived as a transitional category. According to the author, literature begins to emerge from the progressivist mode of thinking about the future and searches for other, slower, local and cyclical forms of artistic time.

In this sense, the strongest argument Penchev develops is the image of the valley. For him, it exceeds its purely geographical meaning and constructs a model of repetition and historical immobility; at a certain point, it begins to function as a critical figure. From this perspective, the valley is read as an anti-progressivist chronotope. It holds the human being within a space in which time does not move according to the ideological logic of revolution, construction and the future, but returns to beginnings, circles around the already known and turns repetition into the main mode of experience. This is precisely what makes it a convenient figure for criticism in the 1960s and 1970s: it names the fear that Bulgarian literature might close itself within the local, the kinship-based, the everyday and the rural, instead of moving towards some universal horizon set by socialism.

The neutralisation of the historical epoch may be seen, for example, in Penchev's analysis of the story "The Twentieth Century". He observes that such a neutralisation of the "century" "sounds scandalous to the ear of orthodox Marxist criticism", because in the poetry of the first half of the 1950s the word "century" denotes not merely a calendar segment, but "a new epoch, a time-space continuum of the utopia being realised". In the story, however, the "century" is invalidated by cyclical rural time: autumn comes, cabbages are cut, and trees are stripped bare every year. The space of the village yard absorbs the

great historical century. In this case, the village yard becomes a place where the great twentieth century loses its revolutionary and progressivist semantics. Historical time is replaced by a natural and everyday cycle. Thus, space does not simply localise the action; it cancels the ideological linearity of time.

Penchev's reading of Nikolay Haitov's *Wild Stories* is also significant. In the early reviews of Haitov, a number of metaphors quickly turned into clichés: "the soul of the Rhodopes", "the spirit of the Rhodopes", "the land of Orpheus". Simeon Sultanov calls Haitov "the discoverer of a world", while Toncho Zhechev insists that Haitov does for the Rhodopes what Elin Pelin does for the region of Shopluk and Yovkov for Dobrudzha.

Thus, the Rhodopes preserve a tragic past, legendary depth and archaic resilience. Penchev explicitly notes that the spirit of place finds its fullest expression in works that operate with the opposition between past and present, as is the case with *Wild Stories*. The Rhodopes become a space that organises the relation between present and past. They are a place where the past has not ended, but continues to act as character, legend and destiny. This Rhodope chronotope returns literature to layers of experience that do not obey the ideological narrative of the future.

Penchev finds an even stronger argument in Ekaterina Tomova's scandalous book of the time, *The Forgotten by Heaven*. Here the Rhodopes are more than a mountain, an ethnographic region or a cultural periphery. They are a place that opens access to a time before history: before the state, before Christianity, before the modern national narrative. Space becomes an archive of primeval time.

The chapter "Kinship against the People" may also be added to the interesting way in which Penchev develops his spatial thesis. Here the researcher notes that after 9 September 1944 the public language in Bulgaria was dominated by the terms "people" and "national/popular", but by the mid-1960s there occurred a rehabilitation of "kinship" and the "native". He connects this with the socio-political context: the transformation of the Bulgarian village through collectivisation and migration. Yet he also adds something more important: "kinship" begins to mean a stable ethnic collective that transcends time, while the native is simultaneously dying and eternal. In this sense, for Penchev the native is a space of belonging, but also a form of time: the time of origin, memory, continuity and eternity. It stands opposed to "the people" as a political-ideological category oriented towards history and the future, as presupposed by communist ideology.

Ultimately, space occupies an exceptionally important place in Penchev's book. It is explored in its geographical dimensions, but its more essential function is temporal. The valley, the village, the Rhodopes, the ancestral place and the archaic landscape are literally Bulgarian locations; more importantly, however, they begin to function metaphorically as forms of time. They condense the past, slow down historical movement, introduce cyclicity and repetition, and

sometimes open access to layers imagined as older than history itself. Therefore, the spatial turn in the book is not a shift away from time, but another way of thinking time. Against the progressivist linearity of socialist ideology, Penchev places spaces in which the future loses its ideological authority: the village yard invalidates the twentieth century, the valley blocks movement as such, the Rhodopes preserve antiquity, and the ancestral place transforms the past into eternity. Space thus proves to be one of the strongest forms of temporal resistance in Bulgarian literature of the 1960s.

However, the strength of this model also gives rise to a certain risk. The opposition between progressivist and conservative time is productive, but at certain points it may lead to an overly clear binarisation of literary processes that are often more mixed and hybrid. Some of the authors analysed by Penchev do not simply leave the horizon of the future, but rework it; others do not return to the past as a stable resource, but present it as fragmented, grotesque or traumatic. Precisely these intermediate cases could form the next step in the conversation opened by the book.

Progressives and Conservatives: Temporal Models in Bulgarian Literature from the Late 1940s to the 1970s should be placed in the context of those scholarly efforts associated with Mihail Nedelchev, Plamen Doinov, Yordan Efetimov and other authors who, over recent decades, have rearranged the way in which the literature of socialism is thought. Boyko Penchev is not content to ask how the literature of the People's Republic of Bulgaria serves, violates or circumvents ideology. He poses a deeper question: how this literature produces time, how it arranges past, present and future, and how it transforms progress, memory, kinship, myth and archaism into models of historical self-consciousness. That is why the title opposition "progressives—conservatives" should not be understood merely as a political or cultural distinction. It is part of a broader critical thinking through which Penchev overturns the interpretation of the literature of the period under study. Instead of thinking it solely through the schemes of ideological construction, resistance, liberation from dogma or the partial autonomisation of the artistic, he presents it as a tension between progressivist and conservative models of time that continue to structure cultural and literary attitudes.

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